

**AN ASSESSMENT OF COMPETITIVENESS OF TOURISM
DESTINATION: THE CASE OF NORTH GONDAR ZONE,
ETHIOPIA**



**A THESIS SUBMITTED TO THE DEPARTMENT OF
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OF MASTER OF ARTS IN MARKETING MANAGEMENT**

BY

KIBRU ASCHALEW

ADVISOR: FENTAYE KASSA (ASSISTANT PROFESSOR)

CO-ADVISOR: TESFAYE GEDEON (MA)

JUNE 2015

GONDAR, ETHIOPIA

UNIVERSITY OF GONDAR
COLLEGE OF BUSINESS AND ECONOMICS
DEPARTMENT OF MARKETING MANAGEMENT
POSTGRADUATE PROGRAM



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CERTIFICATION OF DISSERTATION

University of Gondar

Postgraduate program

This is to certify that the thesis prepared by Kibru Aschalew Woldemariam entitled ‘AN ASSESSMENT OF COMPETITIVENESS OF NORTH GONDAR , ETHIOPIA FROM THE SUPPLIERS’ PERSPECTIVE’ and submitted in partial fulfillment of the requirement for the degree of Master of Arts complies with the regulation of and meets the accepted standards with respect to originality and quality.

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1.	-----	-----	-----
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DECLARATION

I, the undersigned, hereby declare that this thesis is wholly my original work and that any other contributors or sources have either been referenced or appropriately acknowledged.

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Name_____

Signature_____

Signature_____

Date_____

Date_____

ACKNOWLEDGEMENTS

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ABSTRACT

Introduction: *It is important that destinations are able to measure their competitiveness in order to identify their strengths and weaknesses and thereby develop their future strategies. North Gondar's competitiveness as a tourist destination has not been studied and analyzed and so, no study results have been used for an efficient decision making in the sector.*

Purpose: *The aim of this study is to present the results of a survey on the competitiveness of North Gondar as an international tourism destination from a supply-side perspective.*

Methodology: *Both primary and secondary data were used in this research. As methods of collecting primary data, a structured five point Likert scale questionnaire was employed and data was collected from 170 respondents. For secondary data, published; such as books and journals, unpublished statistical materials such as records maintained governmental organizations and researches carried out by individuals, were used. Data was analyzed quantitatively using frequencies, percentages, means, medians, modes and standard deviations in SPSS and results were discussed on importance –performance analysis (IPA) grid.*

Findings: *The study finds that it is only with 33% of the total attributes presented to the respondents that the destination was viewed to be competitive when almost all attributes were seen to be important for the competitiveness of the zone in the international tourism market.*

Practical implications: *Responsible bodies might find the study findings and recommendations useful for providing insights on how to improve the competitiveness of North Gondar as a tourism destination.*

Key words: *Tourism; Tourism destination; Tourism destination competitiveness; Factors of competitiveness; IPA grid; North Gondar zone*

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ABBREVIATIONS AND ACRONYMS

DEMANDCON	=	Demand Conditions
CRERES	=	Created Resources
DESTMNGM	=	Destination Management
ETB	=	Ethiopian Birr
EU	=	European Union
FREQ	=	Frequency
GCSE	=	General Certificate of Secondary Education
GDP	=	Gross Domestic Product
ICT	=	Information & Communications Technology
INHRES	=	Inherited Resources
IPA	=	Importance-Performance Analysis
IT	=	Information Technology
NG	=	North Gondar
NGO	=	Non-Governmental Organization
SD/STDV	=	Standard Deviation
SITCOM	=	Situational Conditions
SUPRES	=	Supporting Resources
T&T	=	Travel and Tourism

TTCI	=	Travel and Tourism Competitiveness Index
UNECA	=	United Nations Economic Commission for Africa
UNESCO	=	United Nations Educational, Scientific and Cultural Organization
UNWTO	=	United Nations World Tourism Organization
VFR	=	Visiting friends and relatives
VUSSC	=	Virtual University for the Small States of the Commonwealth
WEF	=	World Economic Forum
WTTC	=	World Travel and Tourism Council

CHAPTER ONE

INTRODUCTION

1.1 BACKGROUND OF THE STUDY

People today travel for a variety of reasons, one of which is to break the regular monotony of life. It has been said that every year more than 750 million people travel from their residential countries to tourism destination countries for leisure, business and other purposes (Jie and Camilla, 2005).

Tourism is emerging as a leading economic driver for the 21st century. It is an important driver of growth and prosperity and, in developing countries, for poverty reduction. Encouraging the development of the Travel & Tourism sector is more important today given its important role in job creation, at a time when many countries, such as in Africa, are suffering from high unemployment. The sector already accounts for 9 percent of GDP, a total of US\$6 trillion, and it provides 120 million direct jobs and another 125 million indirect jobs in related industries. This means that the industry now accounts for one in eleven jobs on the planet, a number that could even rise to one in ten jobs by 2022 (World Economic Forum, 2013).

Destinations lie at the very heart of the travel and tourism system, representing as they do a mix of products that collectively provide a tourism experience to consumers (Ramona et al., 2009).

Ethiopia, a country composed of nine administrative regions and often expressed as a destination having rich tourism assets and diverse tourist attractions, which include cultural, historical and archaeological attractions, as well as a great variety of flora and fauna, is set to tap into its immense tourism potential in order to become one of Africa's top five tourist destinations by 2020 (www.ethiopianunitydiasporaforum.com/news/ethiopia-envisions-to-be-top-5-tourist-destinations-in-africa-by-2020/).

Amhara region is one of the nine administrative regions in Ethiopia where the four out of the 11 UNESCO registered World Heritages of Ethiopia, are found. Under it the region has 11

administrative zones, one of which is the North Gondar Administrative Zone (Amhara Culture, Tourism and Parks Development Bureau, 2014).

Composed of 23 administrative woredas that all together cover an area of 44,760.47 sq.km, the zone (in which more than 2,982,285 people live (2010/11)) is endowed with marvellous natural as well as manmade attractions which include churches and monasteries, national parks, medieval castles and palaces, natural forest, rivers and falls, beaches (northern shore of lake Tana), hot springs and spa, mountains, flora and fauna, etc. Two of the 11 or of the 4 UNESCO registered World Heritages (namely the Semien Mountains National Park and the Fasil Ghibbi) of the country or of the region respectively are found in the zone (Amhara Culture, Tourism and Parks Development Bureau, 2014).

Over the years the flow of tourists to the zone has shown some growth (see Table 1.1). Tourism, however, has become a fiercely competitive business for tourism destinations all over the world (Annet, 2010). Researchers in the field of tourism have shown that competitive advantage is no longer natural, but it is increasingly man made, driven by science, information technology and innovation. As such it is not simply the stock of natural resources of any given destination that will determine their share in the tourism market, but rather how these resources are managed and integrated with other competences to create a competitive advantage (Jonker, 2004).

Globalization, which resulted in the boom of the tourism sector, presents both opportunities and challenges to North Gondar to be and stay competitive in the tourism market.

To ensure that the benefits from increasing globalisation are shared, all destinations need to guarantee that they have the necessary level of competitiveness (Dwyer in Jonker, 2004). The constantly growing number of travel destinations and the enhanced quality of existing ones put great pressure on those responsible for a given destination to find better ways to compete in the tourism marketplace and to do so in a sustainable manner. The first step in achieving these goals is to better understand those forces and success factors that determine the competitiveness of major tourism destinations. Success factors of a specific destination can then be identified and integrated to ensure sustainable growth for the destination within a competitive environment.

Table 1.1 Flow of both domestic and international tourists to North Gondar zone over the last 5 years

Year	Number of Domestic & International tourists who visited the zone and Revenue generated	Destination		Total
		Debark	Gondar	
2010	Domestic	1,750	54,309	56,059
	International	10,845	20,335	31,180
	Total	12,595	74,644	87,239
	Revenue	19,126,218 Birr	46,989,107 Birr	66,115,325 Birr
2011	Domestic	2,119	74,899	77,018
	International	15,839	25,596	41,435
	Total	17,958	100,495	118,453
	Revenue	25,993,530 Birr	60,611,501 Birr	86,605,031 Birr
2012	Domestic	4,033	87,927	91,960
	International	14,189	25,018	39,207
	Total	18,222	112,945	131,167
	Revenue	20,262,866 Birr	65,193,128 Birr	85,455,994 Birr
2013	Domestic	1,878	83,441	85,319
	International	14,070	32,942	47,012
	Total	15,948	116,383	132,331
	Revenue	37,396,961 Birr	156,057,197 Birr	193,454,158 Birr
2014	Domestic	3,173	344,291	347,464
	International	18,594	42,162	60,756
	Total	21,767	386,453	408,220
	Revenue	49,949,103 Birr	170,911,199 Birr	220,860,302 Birr

Source: (Amhara Culture, Tourism and Parks Development Bureau, 2014).

Though many studies have been made on the issue of destination competitiveness worldwide, there is a gap that no research has been conducted specifically at North Gondar zone level to be

used by responsible bodies to measure the zone's performance. And it appears that the matter has been understood by these tourism responsible bodies of the North Gondar zone in such a way that only the comparative advantages (inherited or endowed resources such as climate, scenery, flora and fauna) of a particular destination can motivate tourists to come and visit a destination than the competitive advantages (destination's ability to use these resources over the long term, and includes resource strategies such as management, skills of workers, service levels, and government policy) plus the comparative advantages.

It is with this in mind that this study sets out to fill this gap, having objectives of identifying the important factors of competitiveness of North Gondar zone as a tourist destination and measuring and reporting on the performance of the zone as a competitive tourism destination

1.2 STATEMENT OF THE PROBLEM

In the context of tourism, globalization means dramatic increases in the number of destinations and also in distances among them (not the physical distance but in the way they present themselves, in a narrow sense, to tourists to influence their experience). International tourism conditions have changed drastically and it has become necessary to address these challenges in order to remain competitive in the tourism market (Doris, 2006).

The success of tourism destinations in world markets is influenced by their relative competitiveness (Armenski, et al. 2011). Due to the international nature of tourism, competition is not just between two or more destinations within a country nor is it a struggle between two or more countries. Each geographical part of a country can be in competition individually with other similar foreign regions on the basis of facilities, cultural heritage assets and natural history (Metin, 2000). A destination endowed with a wealth of resources may not be as competitive as a destination lacking resources; because the latter might be utilizing the little it has much more efficiently (Crouch and Ritchie in Doris, 2006).

Tourism in Ethiopia, though generally in its infancy stage, plays a great role in the economy. The 2014 World Travel and Tourism Council (WTTC) report shows that the direct contribution of Travel & Tourism to GDP in 2013 was ETB 35,766.6 million (4.2% of GDP) and this was

forecasted to rise by 4.5% to ETB (Ethiopian Birr) 37,373.6 million in 2014. The direct contribution of Travel & Tourism to GDP is expected to grow by 4.8% per annum to ETB 59,495.2 million (3.6% of GDP) by 2024 (WTTC, 2014).

Tourism in North Gondar, seen from the growth point of view, is a reflection of the country (it is immature). However, it still has a great role to play in the local economy. For example, as the 2014 Gondar town culture and tourism office report shows the revenue generated from only entrance fee from the tourists who visited Fasil royal enclosure covered approximately 2.7% of the budget allocated for the town for that same year.

Year after year, what the zone plans to achieve is to increase the volume of tourists who visit the zone and maximize their length of stay. However, North Gondar's competitiveness as a tourist destination has not been studied and analyzed and so no study results have been used for an efficient decision making in the sector.

To address this, the following problems are identified as research questions:

1.3 RESEARCH QUESTIONS

Q.1. What are the factors of destination competitiveness to be taken into consideration to increase North Gondar's competitiveness in the tourism marketplace?

Q.2. How important are these factors in determining the competitiveness of North Gondar as a tourist destination?

Q.3. What does the performance of North Gondar as a tourist destination look like when measured in these factors from the suppliers' perspective?

1.4 OBJECTIVE OF THE STUDY

General objective

- To assess North Gondar's competitiveness as an international tourist destination from the suppliers' perspective so as to report on its performance.

Specific objectives

- To identify the important factors of competitiveness which determine the competitiveness of North Gondar as a tourist destination
- To measure the performance of North Gondar's competitiveness as a tourist destination from the suppliers' perspective
- To report on the performance of North Gondar as a competitive tourist destination

1.5 SIGNIFICANCE OF THE STUDY

In terms of its practical contribution, the findings of this study were used to make specific recommendations on how to improve the competitiveness of North Gondar as a tourism destination.

Since no research has been conducted focusing on North Gondar's competitiveness as a tourist destination from the view point of the underlying factors, this study could provide new insights about how tourism destination competitiveness could be improved by examining, identifying and integrating factors for a destination, both for North Gondar and other similar destinations in Ethiopia as well.

Furthermore, this study could serve as a stepping stone to future similar researches in the field of tourism.

1.6 SCOPE AND LIMITATION OF THE STUDY

Scope

This study attempted to assess the competitiveness of North Gondar zone as an international tourism destination (in the year 2015) from the suppliers' (see Appendix A) perspective by focusing on two woredas (Gondar and Debark) where tourism activities are predominantly seen and where there is high concentration of tourism stakeholders. 36 factors (see Appendix B) which are grouped into five categories were identified from the literature review: Ei Ei Khin et al, 2014. Identifying importance of these factors for the competitiveness of the zone and measuring performance of the zone in these factors were what this study set out to achieve. In doing so, it targeted mainly those individuals with more experience in the zone's tourism industry.

Limitations

Areas of limitations that this study was subject to include:

- Though it has clearly been mentioned that tourism in North Gondar is mainly confined to the two woredas (Gondar and Debark), the fact that this study attempts to generalize the tourism industry of the entire zone based on findings of only two woredas may not exactly show the depth of the problem.
- If this study was on a country level, it would have been easy to name major competitors to compare the country with. But, for it was found to be difficult to find specific international competitors on a zone level, the researcher was forced to ask respondents to measure the performance of the destination with a set of attributes comparing it to whatever international destination they think of. These competitors are not identified in this research.
- Though reflecting some commonality, there are different approaches to and models of destination competitiveness developed by different authors, each with its own unique features and displaying attributes. Since it is impractical to include all these attributes of destination competitiveness in a particular study, presenting study results of a specific destination based on some selected factors may miss some important points.
- To minimize the length of the questions in the survey, each attribute was presented in a way that respondents can answer both the ‘importance’ and ‘performance’ sections. This may result in some questions which are not fully clear without the help of the researcher.
- Another limitation of this study is that not all industry stakeholders are included in it only tries to show the picture of competitiveness from only the supply-side and without the demand side views due to the reason that the time this research was conducted was ‘lean season’ (a period of time when a very few or no tourists visit a destination) and getting a representative number of tourists was difficult.
- The other limitation which the researcher encountered was the massive shortage of materials to be used as secondary sources of data regarding the zones performance.

1.7 THE STRUCTURE OF THE REPORT

The thesis was planned to include the following chapters:

- **Chapter 1** serves as a general introduction and states the background of the study, statement of the problem, the research questions, the objectives of the study, the significance of the study, the scope and limitation of the study and organization of the study
- **Chapter 2** provides an in-depth review of existing literature on tourism, destination, destination competitiveness, factors of destination competitiveness
- **Chapter 3** documents the methodology employed in the study. The research design, the measurement procedure, sampling, source of data and method of data collection; and method of data analysis are all covered under this chapter.
- **Chapter 4** presents and discusses the results of the research while **Chapter 5** deals with the research conclusion and makes recommendations based on the findings.

CHAPTER TWO

REVIEW OF LITERATURE

Introduction

People today travel for a variety of reasons. It has been said that every year more than 750 million people travel from their residential countries to tourism destination countries for leisure, business and other purposes (Jie and Camilla, 2005). Some of the reasons of travel include:

Health (i.e. going to see a doctor for a medical emergency; going to a tropical country to enjoy the sun and sea for therapeutic treatments or other medical emergencies); **Leisure** (i.e. vacations or holidays or just for fun and relaxation); **Visiting friends and relatives (VFR)** (part of leisure, this category is, may be, to attend a reunion at a University or college. It may also be to spend time with family after a long time); **Religious reasons** (such as for pilgrimages and religious festival); **Business** (i.e. to transact some form of business deal or present a proposal to overseas investors); **Meetings, incentives, conventions and events** (this category may be considered under business. It looks at the different reasons that someone on business may choose to travel. However, with events, there may be a segment that is there not on business but pleasure or leisure. The event may be for a music festival, or a cultural event); **to see attractions** (i.e. a visit to see the beauty of the historical buildings or the historical exhibits packed within museums may be pull factors for persons to visit a destination. To engage in outdoor recreation and adventures such as skiing, bird watching. Even planning and attending various events, seasonal or not such as the Summer or Winter Olympic Games is a form of tourism); **Educational reasons** (such as a linguistic class engaging in language exchanges with students from other parts of the world or visiting a place of interest in fulfillment of an internship); **Transit reasons** (this is a special count of visitors that do not stay-over in the country but are passing through onwards to the final destination. For example: a passenger from Africa may stopover in transit to Asia in Europe). (Kenner, 2003; Christopher, 2004; Ray, 1994; Bob, 1993; Christopher and Chris, 1995)

All these reasons may be categorized into two main categories –**business** or **leisure**. From these two broad categories it is possible to have a combination of business and leisure in one trip. These categories then come together and form a particular reason for travel (VUSSC, no date). Tourism, having its historic root attached to the movement of nomads from place to place in search of a better way of life, is simply travel for recreational, leisure or business purposes (GCSE Leisure & Tourism, 2009). Another related view of the beginning of tourism is that “travel and tourism have been important social activities of human beings from time immemorial. The urge to explore new places within one’s own country or outside and seek a change of environment has been experienced from ancient times” (Archana, 2012). But tourism as we know it today is “distinctly a twentieth century phenomena” (ibid).

2.1 TOURISM

“Tourism sector, an industry associated with leisure and travel, is one of the fastest growing service industries for many economies around the globe, main source of foreign income for appreciable number of developing countries.” (Imali N. Fernando & Wei Long, 2012)

‘Tourism is the temporary, short-term movement of people to destination outside the places where they normally live and work and their activities during the stay at each destination. It includes movements for all purposes.’ (D. Airey in Patrick Lavery, 1987; Tourism society in Ray, 1994). Another definition for tourism by the UNWTO is that “tourism comprises the activities of persons traveling to and staying in places outside their usual environment for less than a year and whose main purpose of travel is other than the exercise of an activity remunerated from within the place visited” (The Government of the Hong Kong Special Administrative Region, 2009). Tourism and travel are not synonyms. All tourism should have some travel, but not all travel is tourism (Bishwanath, 1998).

2.1.1 Travel and Traveler

Travel comprises all journeys from one place to another. It includes all journeys made by people who enter a country for leisure, to work, reside, study or who just pass through a country without stopping (The Government of the Hong Kong Special Administrative Region, 2009). While

travel refers to the activity of traveler, a **traveler** is someone who moves between different geographic locations, for any purpose and any duration (Mohammed, 1998). (Goeldner et al. in GCSE Leisure & Tourism, 2009) also wrote that “the underlying conceptualization of tourism is that of a traveler. A traveler is someone who makes a trip between two or more countries or two or more localities within his/her country of usual residence.” (ibid). Another related view of a traveler is that “Any person who is taking a trip within or outside his/her own country of residence irrespective of the purpose of travel, means of transport used, even though he/she may be travelling on foot.” (The Government of the Hong Kong Special Administrative Region, 2009).

2.1.2 Visitor and tourist

Visitor

A visitor is a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited (UNWTO, 2010). This can further be divided into:

International visitor

Any person who travels to a country other than that in which he/she has his/her usual residence but outside his/her usual environment for a period not exceeding twelve months and whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited (The Government of the Hong Kong Special Administrative Region, 2009).

Domestic visitor

Any person residing in a country, who travels to a place within the country but outside his/her usual environment for a period of not exceeding twelve months and whose main purpose of visit is other than the exercise of an activity remunerated from within the place visited (The Government of the Hong Kong Special Administrative Region, 2009).

Tourist

The World Tourism Organization defines tourists as people who "travel to and stay in places outside their usual environment for more than twenty-four (24) hours and not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited" (World Tourism Organization in VUSSC, no date). Other further views are presented under the following categories:

International tourists

A visitor who visits another country and stays at least one night in a collective or private accommodation in the country visited (The Government of the Hong Kong Special Administrative Region, 2009).

Domestic tourists

A visitor who stays at least one night in a collective or private accommodation in the place visited within his/her own country (The Government of the Hong Kong Special Administrative Region, 2009).

The very heart of the tourism phenomenon is obviously the tourist and the travel experiences. But again, because destinations are places towards which people (tourists) travel and where they choose to stay for a while (Suarezin in Gabriela, 2012), they lie at the very heart of the travel and tourism system (Ramona et al., 2009). This view is further strengthened by (Metin, 2000) who says 'tourist destinations are accepted to be a key component of the tourism system'.

2.2 (TOURISM/TOURIST) DESTINATIONS

Destinations are regarded as well-defined geographical areas, such as a country, an island or a town, with an amalgam of tourism products, offering an integrated experience to tourists (Buhalis, 2000; Gabriela, 2012). Destinations are not a single product, but composite products consisting of a bundle of different components including: accommodation and food establishments, tourist attractions, arts establishments and cultural venues, and the natural environment (Pop et al. in Gabriela, 2012). It is a combination of tangible physical attributes (such as product, facilities, location and accessibility) and less tangible attributes (such as service, experience and community attitude) (ibid). A demand-supply side perspective of

destination definition is also given by Miroslaw (2012): “From a supply-side perspective, a tourist destination is an area with concentrated tourist-type offers. From a demand-side perspective, it is an area selected by tourists as a place to visit”. In addition, tourist destinations have been defined as areas with different natural and/or man-made features, that will attract non-local visitors or tourists (Georgulas in Jonker, 2004). Jonker (2004) also suggests that “Mathiesin and wall’s (1992) definition of destination is in line with that of Georgulas: ‘a destination area is a place having characteristics that are known to a sufficient number of visitors to justify its consideration as an identity, attracting travel to itself, independent of the attractions of other locations.’”. Another definition supporting the above states that “destinations are specific areas that travelers choose to visit and where they spend a significant amount of time.”(Gee et al in Jonker, 2004).

These definitions reveal that a tourism destination is a “geographic area containing a critical mass of development” (Gunn in Jonker, 2004) and a unique cluster of attractions that satisfy and attract a sufficient number of non-local visitors (Jonker, 2004).

Tourism, considered one of the fastest growing industries, is characterized, by its nature, as having a high level of competitiveness (Megan, 2008). Especially in recent years, tourism has become a highly competitive market for tourism destinations all over the world (Jonker, 2004). Globalization as well as the increased number and buying power of travelers have intensified the competition between the destinations (Inger, 2010). Competitive advantage is no longer natural, but increasingly man-made, driven by science, information technology and innovation (Jonker, 2004). As such it is not simply the stock of natural resources a particular destination has which determines its market share, but rather how these resources are managed and integrated with other competences to create a competitive advantage (Jonker, 2004).

2.3 COMPETITIVENESS

As Roger (2004) explains, “the concept of competitiveness has been widely debated and argued, most notably in competition between firms mainly, and to a lesser extent, nations.” This is supported by Fang (2006) who says “the wider literature of competitiveness provided useful insights in examining the various determinants of “national” or “firm” level of competitiveness

issues”. Roger further explains that “in defining competitiveness, the definition depends on the focus of interest. For a firm, for instance, competitiveness has been defined as “the ability to produce the rights goods and services of the right quality, at the right price, at the right time. It means meeting customers’ needs more efficiently and more effectively than other firms” (Begg 1999 in Roger, 2004). A nation’s competitiveness is defined as “the degree to which it can, under free and fair market conditions, produce goods and services which meet the test of international markets, while simultaneously maintaining and expanding the real incomes of people over the long term” (ibid). But generally, as Gianluca (2013) argues, it can be concluded that studies have defined competitiveness either explicitly or implicitly as having more of something such as market share, profits, success, etc. than that of another destination.

Though criticized for not making clear distinction between distinction between comparative and competitive advantage (Ritchie & Crouch in Fang, 2006); and not addressing the special considerations related to determining the competitiveness in service sector, the discussion of competitiveness in relation to comparative and competitive advantage is covered in the general literature (Ritchie & Crouch; Porter; Sapir in Fang, 2006).

Bringing the matter to tourism (destinations), the concepts of comparative and competitive advantage have been proposed in relevant to tourism destination (Ritchie & Crouch; Dwyer & in Fang, 2006). For a tourism destination, comparative advantage would relate to inherited or endowed resources such as climate, scenery, flora, fauna, etc., while competitive advantage would relate to created items such as the tourism infrastructure (hotels, attractions, transport network, etc.), festivals and events, the quality of management, skills of employees, government policy and so on (Fang, 2006). It is perceived that comparative advantage involve the resource available to a destination, whereas competitive advantage relate to a destination’s ability to effectively utilize the resource (ibid).

2.4 (TOURISM/TOURIST) DESTINATION COMPETITIVENESS

Though it is not possible to have a single definition of competitiveness in the tourism sector (EU report, 2013), different definitions and views on the subject are presented next. Competitiveness in tourism can be described with the elements that make a destination competitive as defined by

Ritchie and Crouch (in Gianluca, 2013), 'ability to increase tourism expenditure, to increasingly attract visitors, while providing them with satisfying, memorable experiences and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations'. Thus competitiveness in tourism has several dimensions: economic, socio-cultural and environmental (Ramona et al., 2009).

Buhalis (2000) and Hassan (2000) highlight the relationship between competitiveness and economic prosperity and the delivery of an experience that is more satisfying compared to other similar destinations. Buhalis (2000), after generally defining competitiveness as 'the effort and achievement of long-term profitability, above the average of the particular industry within which they operate, as well as above alternative investment opportunities in other industries', suggests that 'tourism destinations competitiveness should also include the sustainability of local resources for ensuring the maintenance of long term success as well as the achievement of equitable returns-on-resources utilized to satisfy all stakeholders'. He also identifies four main objectives for a competitive destination: enhance the long-term prosperity of local people; maximize visitors' satisfaction; maximize profitability of local businesses and generate multiplier effects; optimize tourism impacts (Buhalis in Gianluca, 2013). In Hassan's view, competitiveness concerns 'the destination's ability to create and integrate value added products that sustain its resources while maintaining market position relative to competitors' (Hassan, in Dwyer and Kim, 2003).

Other important definitions and views on destination competitiveness include those given by Dwyer, Poon, Go and Govers; and D'Hartserre: According to d'Hartserre (in Fang, 2006), competitiveness is 'the ability of a destination to maintain its market position and share and/or to improve upon them through time'. Whereas in Dwyer and Kim's view, 'Destination competitiveness would appear to be linked to the ability of a destination to deliver goods and services that perform better than other destinations on those aspects of the tourism experience considered to be important by tourist' (Dwyer and Kim, 2003). Poon (in Noeme, 2009; Doris, 2006), suggested four key principles which destinations must follow if they are to be competitive: put the environment first, make tourism a leading sector, strengthen the distribution channels in the market place and build a dynamic private sector. Go and Govers (in Noeme,

2009; Doris, 2006), measured a destination's competitive position relative to other destinations along seven attributes – facilities, accessibility, quality of service, overall affordability, location image, climate and environment, and attractiveness.

While there seems to be a consensus in the literature about the main objectives of competitiveness, there are various ways of explaining and measuring competitiveness in tourism literature (Gianluca 2013). Various models were developed to explain and/or measure destination competitiveness.

2.5 MODELS, INDICES AND FACTORS OF DESTINATION COMPETITIVENESS

Several researchers have agreed that most detailed, comprehensive and most well-known work on the field of destination competitiveness is that of Ritchie and Crouch's: 'Ritchie and Crouch (1993) have developed a comprehensive model for tourism organizations, which can be analyzed further to include the entire range of factors affecting the competitiveness of destinations.' (Buhalis, 2000); "The most detailed work undertaken by tourism researchers on overall destination tourism competitiveness is that of Crouch and Ritchie (1995, 1999) and Ritchie and Crouch (2000, 2003), who purports that, in absolute terms, 'the most competitive destination is one which brings about the greatest success; that is, the greatest well-being for its residents on a sustainable basis'" (Leiseth, 2010); 'The general conceptual model of destination competitiveness developed by Crouch and Ritchie (1999), additionally refined in Ritchie & Crouch (2000) and amply detailed in Ritchie & Crouch (2003), is the most well-known conceptual model of destination competitiveness in tourism literature and has been the starting point for many other research studies about destination competitiveness' (Gianluca, 2013); 'one of the most remarkable studies in destination competitiveness has been elaborated by Crouch and Ritchie (1999)... and has been widely cited in the competitiveness literature' (Benedetti, 2010).

Other models of competitiveness have also been developed by Dwyer and Kim (2003), Hassan (2000), Heath (2002), Gomezelj & Mihali (2008), Ei Ei Khin et al (2014), etc.

2.5.1 The Ritchie & Crouch's Conceptual Model of Destination Competitiveness

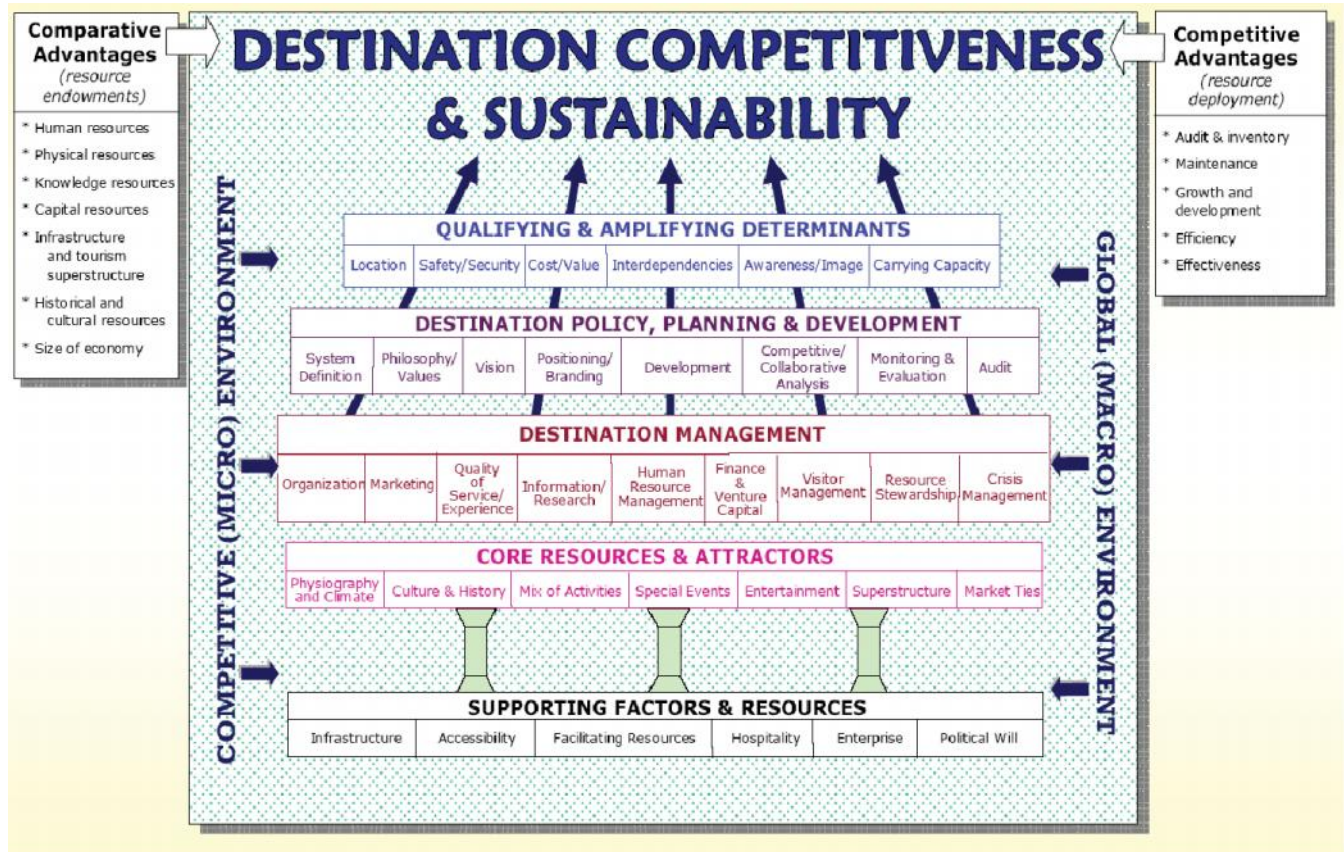
As explained above, Crouch and Ritchie developed a destination competitiveness framework (Figure 2.1) which has been widely cited in the competitiveness literature. This model of destination competitiveness (Figure 2.1.) was originally developed by Crouch and Ritchie (1999), was additionally refined in Ritchie & Crouch (2000) and was adequately detailed in Ritchie & Crouch (2003) (Gianluca, 2013). The foundations for the construction of the framework are the concepts of comparative and competitive advantage.

Comparative advantages are those with which a destination has been blessed by God and/or nature — as well as those which the country and its society have developed and accumulated over time. Comparative advantage seems to relate to things like climate, beautiful scenery, attractive beaches, wildlife etc. Comparative factors are close to primary tourism supply (natural, cultural and social attractiveness). We can never reproduce them with the same attractiveness. On the other hand, competitive advantage relates to tourism infrastructure, the quality of management, the skills of the workforce, government policy etc. (Ritchie and Crouch in Doris 2006). Competitive factors refer to secondary tourism supply. They can be produced and improved by the tourist firms or governmental policy. Both kinds of factors are co-dependent. Without secondary tourism supply the tourism destination is not able to sell attractions, e. g. primary tourism supply on a tourist market, and without primary supply the tourism infrastructure is not useful.

To understand the competitiveness of tourist destinations, we should consider both the basic elements of comparative advantage as well as the more advanced elements that constitute competitive advantage. Where comparative advantages constitute the resources available to a destination, competitive advantages mean a destination's ability to use these resources effectively over the long-term. Destination with a wealth of resources may sometimes not be as competitive as a destination with a lack of resources. A destination that has a tourism vision, shares the vision among all the stakeholders, has management which develops an appropriate marketing strategy and a government which supports tourism industry with an efficient tourism

policy, may be more competitive than one that has never asked what role tourism is to play in its economy (Crouch and Ritchie in Doris, 2006).

Figure 2.1 The Ritchie and Crouch's Conceptual Model of Competitiveness



Source: Ritchie & Crouch (2003)

The model identifies 36 attributes of competitiveness grouped into five key factors which are under constant influence of:

A. The global (macro) environment: Tourism is subject to many influences and pressures that arise outside the system itself - the global or macro- environment. This environment consists of external influences and pressures that have implications on all human activities and are, therefore, not specific to the travel and tourism industry in their effects for it is global in its scope. What happens in one part of the world can have consequences for tourist destinations on the other part of the world. Global forces can alter the destination's attractiveness to tourists; shift the pattern of wealth to create new emerging origin markets, etc. These forces present a particular tourist destination with a number of special concerns, problems, or issues that the destination must either adapt to, or overcome. The global (macro) environment is in a

constant state of change and evolution. Destination managers need to regularly monitor the environment if they are to understand the ‘big picture’ and foresee and pre-empt changes altering the tourism landscape. These macro environmental forces are categorized into six principal groups related to *the economy, technology, ecology, political and legal developments, socio-cultural issues*, and *the constantly evolving demographic environment*.

- B. The competitive (micro) environment:** This environment is made up of organizations, influences, and forces that lie within the destination’s immediate surroundings of tourism activities and competition. And they tend to have a more direct and immediate impact than do elements of the global (macro) environment, as a general rule. The micro-environment, because of its closeness often occupies the attention of managers. In addition to the various tourism markets, competing destinations, and a destination’s publics or stakeholder, it includes other entities that together form the so called ‘travel trade’. Elements of a destination’s competitive (micro) environment include *suppliers, intermediaries and facilitators, customers, competitors, internal environment or internal culture* and finally *publics*.

2.5.1.1 The five main groups of factors of destination competitiveness

- 1. Core resources and attractors:** This component of the model describes the primary elements of destination appeal. It is these factors that are the key motivators for visitation to a destination. They are described as the fundamental reasons that prospective visitors choose one destination over another while other components are essential for success and profitability. They are sub-divided into, *physiography and climate, culture and history, market ties, mix of activities, special events, entertainment, and the tourism superstructure*. Physiography and climate includes the overall nature of the landscape and the climate of the destination. As a factor over which destination managers have little or no control and around which other factors must be creatively developed, physiography and climate defines much of the aesthetics and visual appeal of the destination. Another enormously important factor is culture and history which, though from a management perspective can be seen as something that can easily be influenced or changed, little or no attempt should be made to alter for the purpose of tourism development. Market ties including those such as ethnic ties (resulting

from immigration), 'visiting friends and relatives' (VFR) (not necessarily the most profitable segment), religion, sports, trade, and culture; is one that evolves over time. Though outside the direct control of tourism destination managers, it can be influenced to varying degrees by those responsible for managing a tourism destination. It includes several dimensions along with a destination that establishes and builds linkages with the residents of tourism originating regions. Another component which represents one of the most critical aspects of destination appeal is the range or mix of activities within a destination. It is one over which destination managers do have extensive influence and control. An interesting reality here is that this dimension of destination attractiveness appears to be growing in importance as the traveler increasingly seeks experiences that go beyond the more passive visitation practices of the past. The challenge facing those involved in managing the tourism destination is to develop those activities that take advantage of the natural physiography of the destination while remaining consistent with the local culture and its value. Special events, an extension to that of the activities mix, refers to a wide range of 'happenings' that can create high levels of interest and involvement on the part of both visitors and residents ranging from 'mega-events' such as the Olympic Games, world expositions, and global sporting championships to Local festivals. Another category of destination core resources or attractors is Entertainment. The theatre, concerts, comedy festivals, operas, and circuses are examples of the contribution that the entertainment sector can make toward a destination's competitiveness. The last, but not the least, dimension of destination attractiveness is tourism superstructure. It is one over whose development destination managers can exert a considerable amount of control and is (comprised primarily of accommodation facilities, food services, transportation facilities, and major attractions) that many view as the 'tourism industry'.

2. **Supporting factors and resources:** A destination with abundance of core resources and attractors but with scarcity of supporting factors and resources, may find it very difficult to develop its tourism industry as the latter provide a foundation upon which a successful tourism industry can be established. One of the most important supporting factors is the condition and extent of a destination's general **infrastructure**. Some elements of infrastructure have a very direct influence on destination competitiveness. For example, transportation services and facilities are vital to travelers. Highways, railways, bus services, airports, ferries etc. convey travelers to and from desired points of interest. A destination is

more competitive when transportation systems are reliable, efficient, clean, safe, frequent, and able to take traveler to the locations and attractions of greatest interest. In fact, infrastructure elements important to all economic and social activity, such as sanitation systems, communication systems, public facilities, a reliable and potable water supply, legal systems etc., also provide the basis for an effective and efficient tourism industry. **Facilitating resources** and services include those such as the availability and quality of local human, knowledge and capital resources, education and research institutions, financial institutions, various areas of the public service, etc. Another important thing is that the tourism industry is full of many small to medium sized **Enterprises**. Competition, cooperation, specialization, innovation, facilitation, investment, growth, income distribution and equity, risk taking, productivity, gap filling, product diversification, seasonality management of these enterprises in a healthy way is vital. **Accessibility** within a destination can mean the accessibility of tourism resources such as mountains, national parks, unusual land formations, scenic regions, lakes and rivers etc. A destination's resources are hardly relevant to the issue of competitiveness unless they are accessible to potential tourists and tourism operators alike. Regarding **hospitality**, quite simply, it is not enough to deliver all the attributes of an experience in a cold and detached manner. Each individual visitor must feel that they are more than a source of cold cash revenue for the business or destination. But it should be understood that visitors have a natural human desire for warm acceptance as they seek to enjoy the range of experiences the destination has to offer. And finally, **political will** is not just a function of the attitudes and opinions of politicians alone. All community leaders shape political attitudes toward the contribution that tourism might make in helping to stimulate economic and social development and then the quality of life in the destination.

3. **Destination policy, planning and development:** can be understood as the 'intellectual process that uses information, judgment and monitoring to make macro-level decisions regarding the kind of destination that is desirable, the degree to which ongoing performance and related changes in the nature of visitation and the physical character of the destination are contributing to the achievement of the kind of destination that stakeholders want' (Vanhove in Benedetti, 2010). It is constituted by the **System Definition**, which concerns the definition of subject of the strategic framework to be formulated; destination **Vision**, which is a more specific definition of what the destination should become when adopting a particular

philosophical perspective; **Philosophy/Value** of the stakeholders, which will shape the policy framework; **Positioning/Branding**, or destination position in the market in relation to its competitors; **Development**, with a policy that includes all demand and supply-side issues that influence destination competitiveness; **Competitive/Collaborative Analysis**, or the evaluation of how the destination relates and compares to what other destinations are doing and how they are performing; **Monitoring and Evaluation** of the established policies and their outcome; and the **Audit** of the destination attributes, strengths and weaknesses, issues and strategies to establish a tourism development policy based in reality.

4. **Destination management:** focuses on those activities which implement, on a daily basis, the policy and planning framework established under *destination policy, planning and development*, enhance the appeal of the *core resources and attractors*, strengthen the quality and effectiveness of the *supporting factors and resources*, and adapt best to the constraints or opportunities imposed or presented by the *qualifying and amplifying determinants*. The function of destination **marketing**, perhaps, is the most traditional of these activities. Destination management is a micro-level activity in which all the stakeholders carry out their individual and organizational responsibilities on a daily basis in efforts to realize the macro-level vision contained in policy, planning and development. It comprises nine elements, of which the first – **Organization** – is related to managerial and administrative task. The following is Marketing, representing the more traditional tasks of selling and promoting, but also other activities that impact the destination competitiveness, such as product development, packaging, innovation to meet the demand needs, etc. The successive elements are **Quality of services/experiences**; **Information/Research**; **Human Resource Management**; **Finance and Venture Capital** (public sector support programs such as funding, grants taxation concessions, etc., which promote the realization of the destination vision); **Visitor Management**; **Resource Stewardship** (maintenance and care of the destination's economical, social, cultural and ecological resources); and **Crisis Management**.
5. **Qualifying and amplifying determinants:** These qualifiers and amplifiers moderate or magnify destination competitiveness by filtering the influence of the other three groups of factors. They may be so important as to represent a ceiling to tourism demand and potential, but are largely beyond the control or influence of the tourism sector alone to do anything

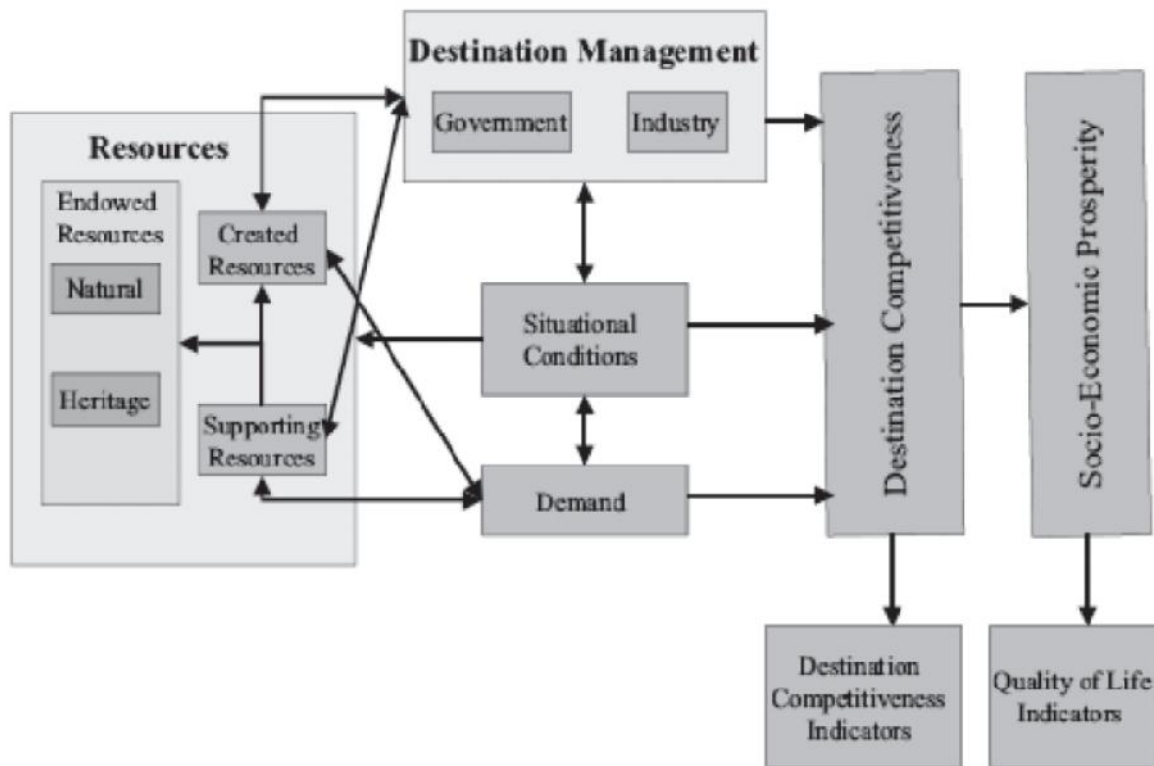
about. Although destinations have little or no control over these factors, the extent to which destinations act proactively towards the threats and opportunities represented by these factors has likely an influence in their competitiveness. The factors identified by Ritchie and Crouch are six: **Location**; **Safety/Security**, which has the largest impact in the visitors destination choice; **Cost/Value**; **Interdependencies** to other destinations, for instance war on a neighboring destination; **Awareness/Image**; and **Carrying Capacity**, related to the demand the destination can handle without sacrificing its sustainability.

2.5.2 The Dwyer & Kim's Integrated Model of Destination Competitiveness

Dwyer & Kim are other researchers who also contributed to the development of a general model of destination competitiveness. Their model (Figure 2.2) – The Dwyer & Kim's Integrated Model of Destination Competitiveness (Dwyer & Kim, 2003) – considers national and firm competitiveness theory as well as 'the main elements of destination competitiveness as proposed by tourism researchers ... and many of the variables and category headings identified by Crouch and Ritchie' (Dwyer et al. in Crouch, 2007). The primary elements of the model include resources comprising endowed resources, both 'natural' (e.g., mountains, coasts, lakes, and general scenic features) and 'heritage' (e.g., handicrafts, language, cuisine, customs, etc.) resources; created resources (such as tourism infrastructure, special events, shopping, etc.); and supporting resources (such as general infrastructure, accessibility, service quality, etc.). Destination management is the second core component of their model comprising government and industry. Their model then shows resources and destination management interacting with tourism demand and situational conditions to influence destination competitiveness and socio-economic prosperity.

Though the integrative model proposed by Dwyer & Kim (2003) contains many of the variables and category headings identified by Crouch and Ritchie, it differs with some important respects. To begin with, the researchers (Dwyer & Kim) themselves claim that the distinction between inherited (endowed) and created resources, explicitly drawn in the integrated model, but not in the Crouch-Ritchie model, seems to be a useful one, which has policy significance. In the integrated model, market ties are included among the Supporting Factors and Resources, rather than under Core Resources and Attractors as in the Crouch-Ritchie model.

Figure 2.2 The Dwyer & Kim's Integrated Model of Destination Competitiveness



Source: Dwyer & Kim (2003)

A second claim is that integrated model (proposed by Dwyer and Kim) explicitly recognizes Demand Conditions as an important determinant of destination competitiveness. Tourist awareness of alternative destinations, their perceptions of different destinations, and their perception of the extent to which the destination's product offerings will meet their needs, are critical to tourist flows. A destination's product must develop in a way that matches the evolving consumer preferences, if the destination is to enhance or even maintain competitiveness. The Crouch-Ritchie model seems to neglect the demand side of competitiveness determination. Focus on the supply side determinants gives an incomplete picture of destination competitiveness.

Table 2.1 Differences between (Comparison of) Dwyer & Kim's model and Ritchie & Crouch's model

Integrated Model	Crouch-Ritchie Model
Endowed Resources Natural Resources Cultural/Heritage Resources Created Resources Tourism infrastructure Special events Range of available activities Entertainment Shopping	Core Resources & Attractors Physiography and Climate Culture and History Market Ties Mix of Activities Special Events Entertainment Superstructure
Supporting Factors and Resources General Infrastructure Quality of Service Accessibility of Destination Hospitality Market Ties	Supporting Factors & Resources Infrastructure Accessibility Facilitating Resources Hospitality Enterprise
Destination Management Destination Management Organisation <ul style="list-style-type: none"> • Coordination • Provision of information • Monitoring and evaluation Destination Marketing Management Destination Policy Planning, Development Human Resource Development Environmental Management	Destination Management Marketing Finance and Venture Capital Organisation Human Resource Development Information/Research Quality of Service Visitor Management Resource Stewardship
Situational Conditions Destination Location Competitive (micro)Environment <ul style="list-style-type: none"> • Capabilities of Firms • Strategies of Firms • Industry Structure and Firm Rivalry Global (macro) Environment <ul style="list-style-type: none"> • political/legal/regulatory • economic • sociocultural • technological Security/ safety Price competitiveness	Destination Policy, Planning, Development System definition Philosophy Vision Audit Positioning Development Competitive/collaborative analysis Monitoring & evaluation Competitive (micro) Environment Global (macro) Environment
Demand Conditions Tourist preferences Awareness of destination Destination image	Qualifying & Amplifying Determinants Location Interdependencies Safety/security Awareness/image/brand Cost/value

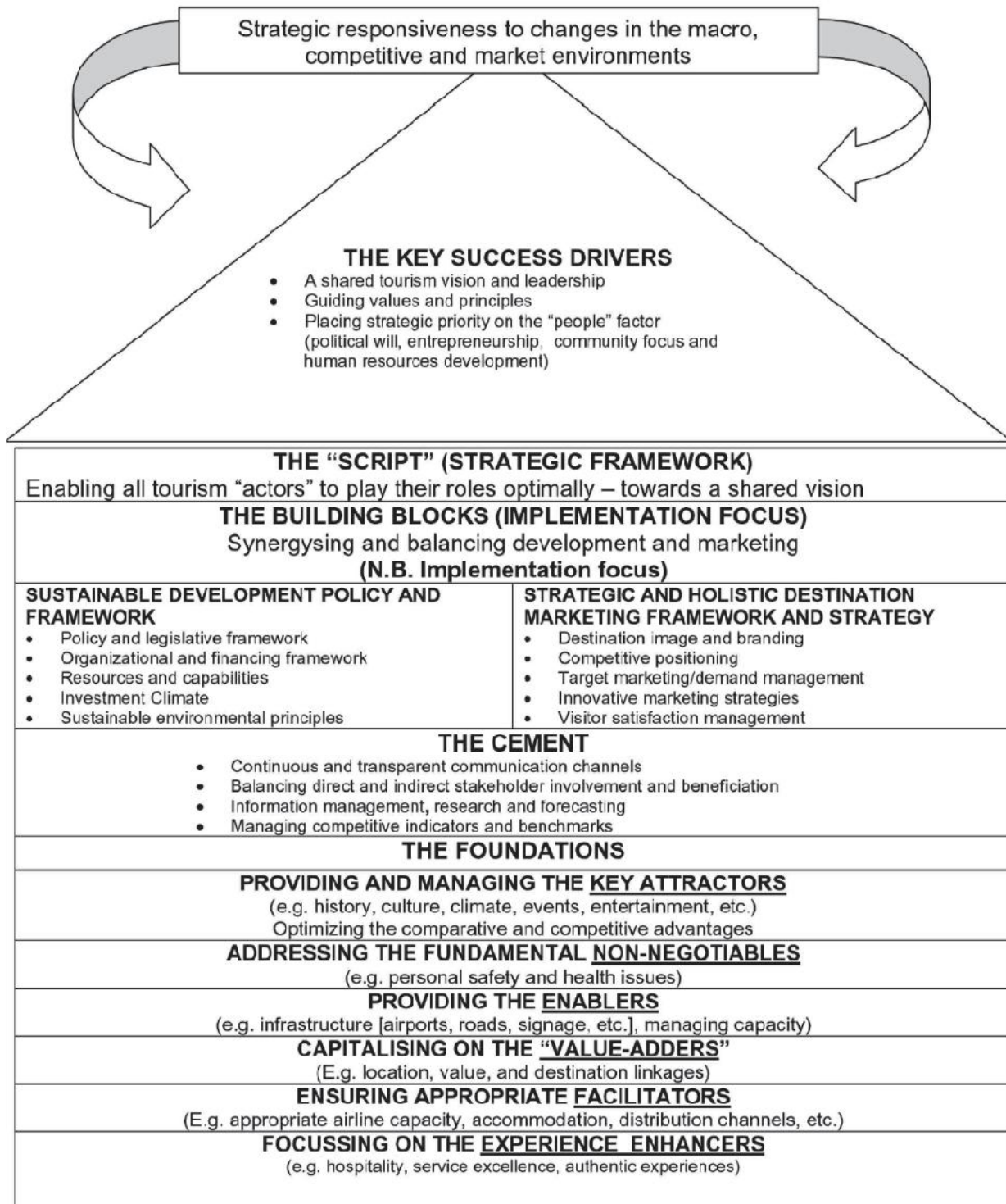
A third claim is that the Crouch-Ritchie model includes awareness/image/brand among the Qualifying and Amplifying Determinants. In the integrated model visitor awareness is included as a Demand Condition. The image and brand of a destination also have relevance for Demand but they are acknowledged also to be fashioned by Destination Marketing Management, a major sub category of Destination Management.

Other differences include the way some determinants of destination competitiveness are grouped: The Crouch-Ritchie model lumps all infrastructure together under the label superstructure and includes this among the Core Resources and Attractors. In contrast, the integrated model distinguishes between *tourism* infrastructure and *general* infrastructure and allocates only the former to Created Resources. General infrastructure does not have tourist pulling power as such and is therefore included among the Supporting Factors and Resources. The Crouch-Ritchie model includes *Enterprise* under *Supporting Factors and Resources*. The integrated model includes *enterprise* within elements of the *Competitive (Micro) Environment*. And Dwyer and Kim say ‘this acknowledges the views of Porter and others who have argued that the strategies of firms and organizations in the home country, and its competitive environment generally, provide the context for productivity increases’ (Dwyer and Kim, 2003). Furthermore, a summary of comparison between the two models (Crouch-Ritchie’s Vs Dwyer and Kim’s) is presented above (Table 2.1) so that differences can be seen easily.

2.5.3 Heath’s Model of Destination Competitiveness

Heath (2002) also proposed a model of destination competitiveness (figure 2.3) that intends to provide an integrated approach of the different issues concerning competitiveness. His model is presented as structural elements of a house: the foundations, the cement, the building blocks and the roof. The foundation, as the name suggests, concerns the main base of competitiveness. It includes Providing and Managing the Key Attractors (such as culture, events, climate, etc); Optimizing the Comparative and Competitive advantage; Addressing the Fundamental Non-negotiables (e.g., personal safety and health issues); Providing the Enablers (e.g., airports, roads); Capitalizing on the ‘Value Adders’ (e.g., location, value); Ensuring Appropriate Facilitators (such as accommodation, distribution channels); Focusing on the Experience Enhancers (e.g., service excellence, hospitality and authentic experiences).

Figure 2.3 Heath's Model of Destination Competitiveness



Source: Heath (2002)

The Cement represents the link among the following aspects of competitiveness, such as: continuous transparent communication channels; balancing direct and indirect stakeholders involvement and beneficiation; information management, research and forecasting; managing competitive indicators and benchmarks. The Building Blocks, on the other hand, refer to the necessary elements for the functioning of tourism in a destination: Sustainable Development Policy and Framework (covering/involving policy, legislation, organization, finance, resources, investment climate, sustainable environment principles); and a Strategic and Holistic Destination Marketing Framework and strategy (related to destination image and branding, competitive positioning, target marketing/demand management, innovative marketing strategies, visitor satisfaction management). Finally, the Roof regards the human factor of the destination, considered as the key success drivers, which can be translated into a common vision and leadership in tourism, guiding values and principles, placing strategic priority in human-related issues such as political will, entrepreneurship, community focus and human resources development.

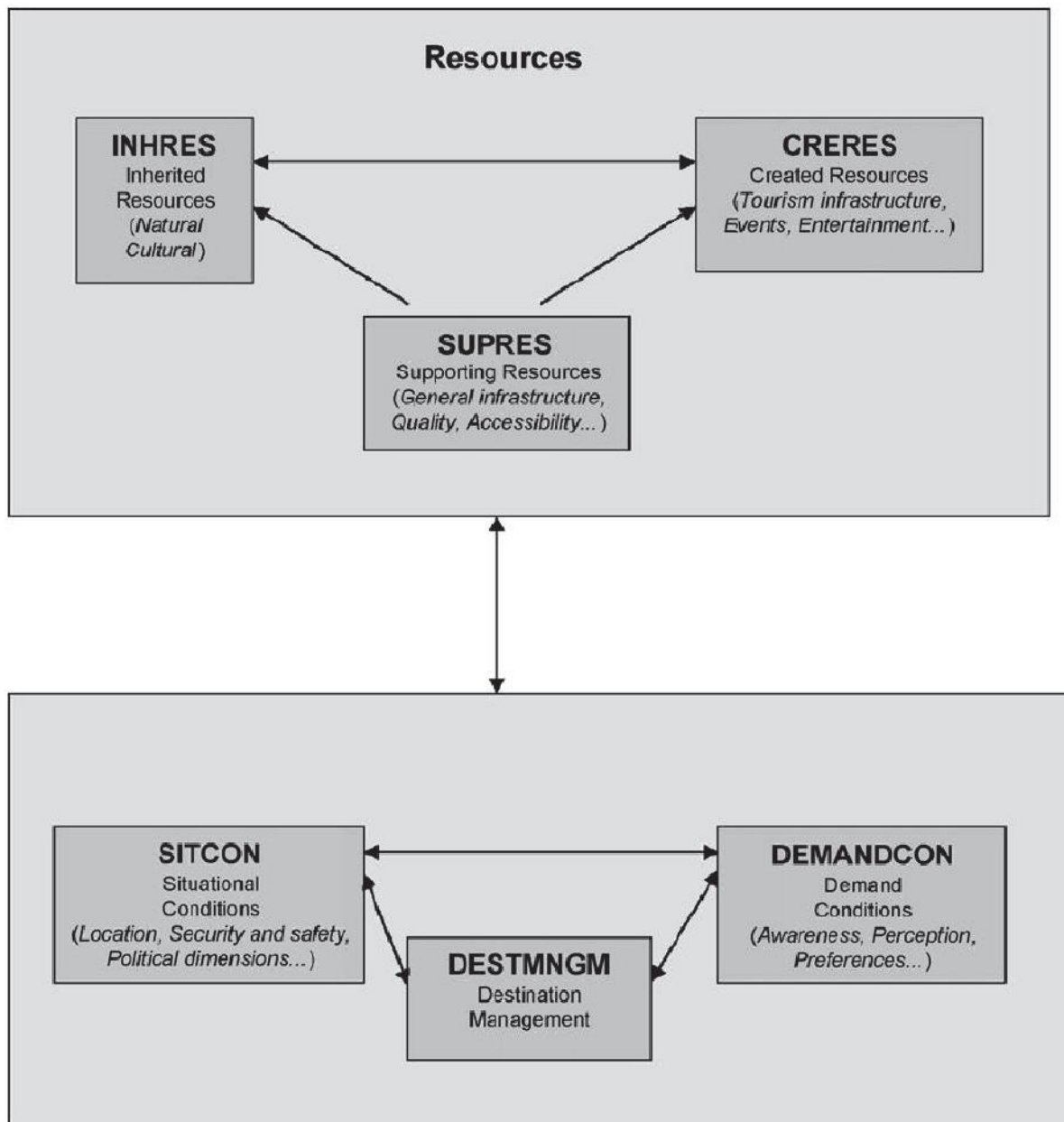
Heath (2002) adapts a model that "... brings together the main elements of destination competitiveness as proposed in the wider literature and the main indicators of destination competitiveness as proposed by various tourism researchers such as Crouch et al. ... and Dwyer (2001)" (Gianluca, 2013). This is supported by Benedetti (2010) who says "Heath's model shares many common factors as identified by Ritchie and Crouch and Dwyer and Kim. May be the most remarkable characteristics of this model is that more emphasis is placed on the human-related factors (the 'roof').".

Other models of destination competitiveness include Gomezelj & Mihali 's (2008). This model, as displayed in Figure 2.4, is adapted from the Dwyer & Kim's model (Armenski et al., 2011) and contains the following elements:

Inherited (INHRES), Created (CRERES) and Supporting Resources (SUPRES) encompass the various characteristics of a destination that make it attractive to visit. Destination Management (DESTMNGM) covers factors that enhance the attractiveness of the inherited and created resources, and includes the activities of destination management organizations, destination

marketing management, destination policy, planning and development, human resource development and environmental management. As in Dwyer and Kim (2003), the model also

Figure 2.4 Gomezelj & Mihali (2008) Destination competitiveness model, the main determinants

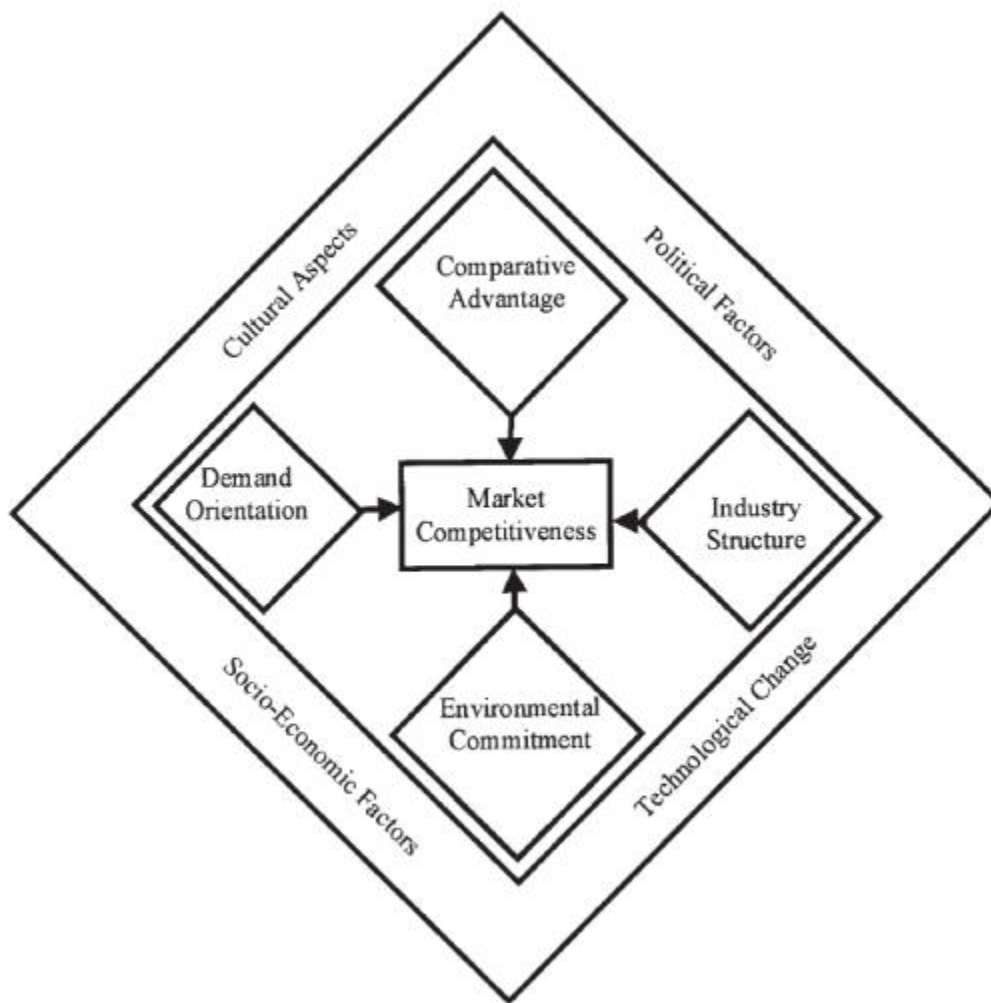


Source: Omerzel Gomezelj & Mihali (2008)

develops a separate box on demand conditions. These (DEMANDCON) comprise the three main elements of tourism demand: awareness, perception and preferences. The factors of situational conditions (SITCOM) can moderate, modify or even mitigate a destination's competitiveness.

Hassan's model (2000) highlights the importance of environmental sustainability, as one of the four determinants of tourism competitiveness. The model defines a destination's commitment to the environment as one of the four determinants of tourism competitiveness; and includes also

Figure 2.5 Determinants of Market Competitiveness, Hassan's Model of Destination Competitiveness



Source: Hassan (2000)

comparative advantage, industry structure and demand factors. These four determinants (as shown in figure 2.5) are as follows:

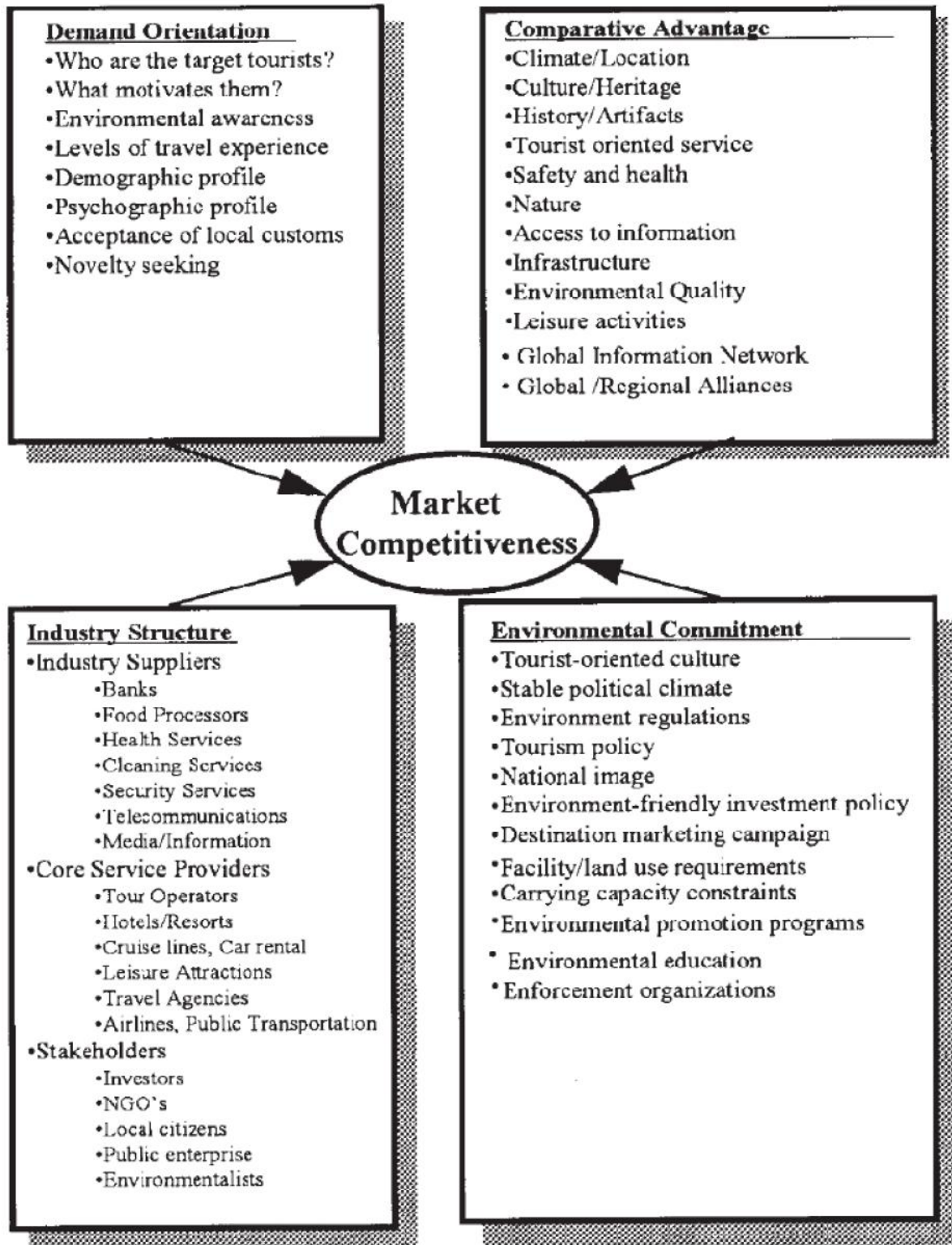
1. *Comparative advantage*. The destination's comparative advantage includes factors associated with both the macro and micro environments that are critical to market competitiveness.
2. *Demand orientation*. The destination's ability to respond to the changing nature of market demand (such as motivation of travel, environmental awareness, demographic and psychographic profile, among others) will influence its competitiveness.
3. *Industry structure*. The existence or absence of an organized tourism-related industry structure can be associated with the destination's ability to compete, including industry suppliers (for e.g., bank, health and telecommunication services), core services providers (for e.g., hotels, tour operators, transportation, leisure attractions) and stakeholders (investors, NGOs, local citizens, public enterprises and environmentalists).
4. *Environmental commitment*. The destination's commitment to the environment will influence the potential for sustained market competitiveness. Elements included here take account of the destinations tourist oriented culture, its environment regulations, its marketing campaign, tourism policy, political stability, etc.

The detailed depiction of Determinants of Market Competitiveness is illustrated in Figure 2.6.

Other indices (not models), as shown in figure 2.7, of competitiveness include the one proposed by the World Economic Forum (WEF) which was developed by collecting secondary data from a range of international organizations and from surveys submitted to tourism industry members.

This index – the Travel and Tourism Competitiveness Index (TTCI) – is based on three broad categories of variables that facilitate or drive Travel and Tourism (T&T) competitiveness. These categories are summarized into the three sub-indexes of the Index (Sub-indexes A, B and C): (A) the T&T regulatory framework sub-index; (B) the T&T business environment and infrastructure sub-index; and (C) the T&T human, cultural and natural resources sub-index. The first sub-index captures those elements that are policy related and generally under the control of the government; the second sub-index captures elements of the business environment and the “hard”

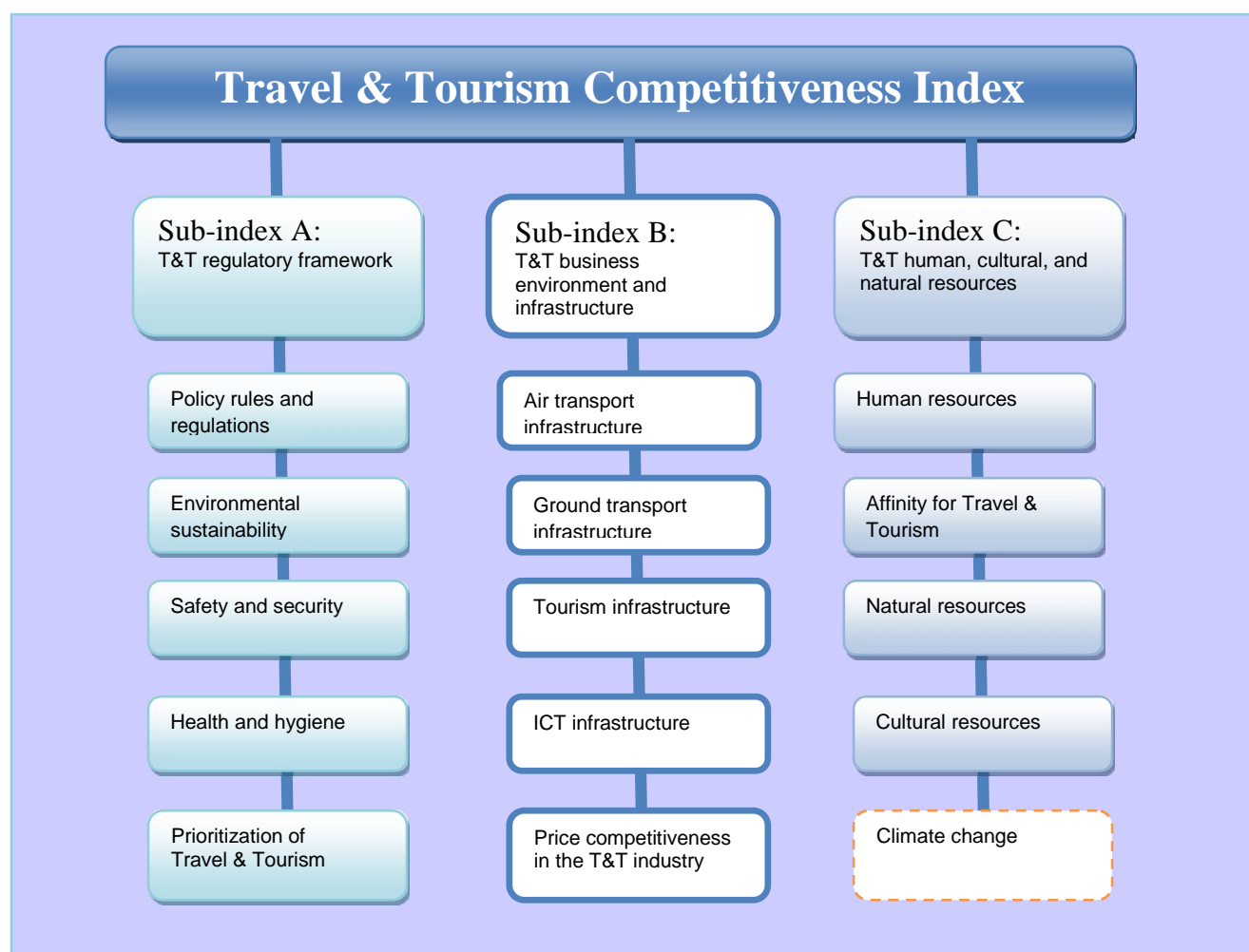
Figure 2.6 Detailed Depiction of Determinants of Market Competitiveness, Hassan's Model



Source Hassan (2000)

infrastructure of each economy; and the third sub-index captures the “softer” human, cultural, and natural elements of each country’s resource endowments. Each of these three sub-indexes is composed in turn by a number of pillars of T&T competitiveness, of which there are 14 in all. These are: Policy rules and regulations, Environmental sustainability, Safety and security, Health and hygiene, Prioritization of Travel & Tourism, Air transport infrastructure, Ground transport infrastructure, Tourism infrastructure, ICT infrastructure, Price competitiveness in the T&T industry, Human resources, Affinity for Travel & Tourism, Natural resources and Cultural resources.

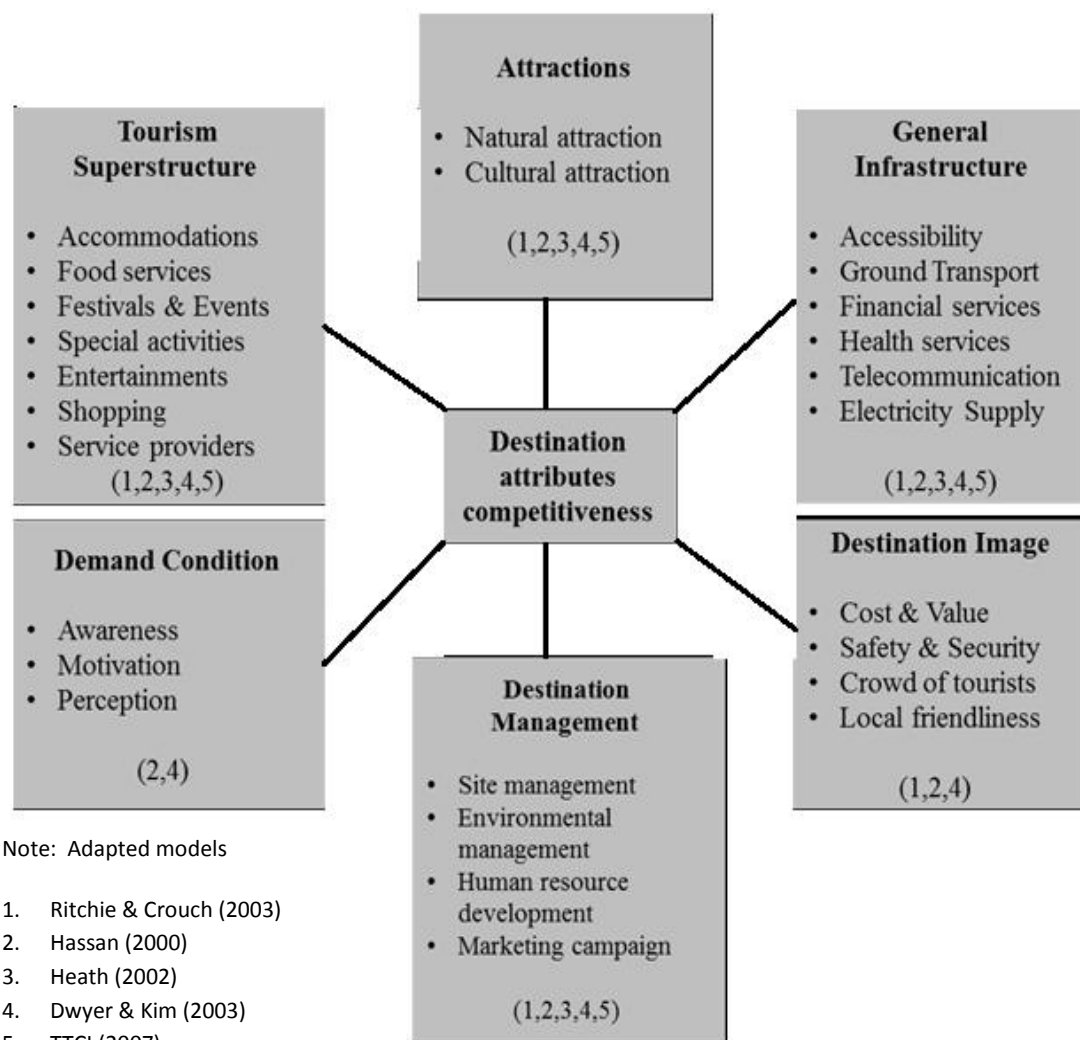
Figure 2.7 Composition of the three sub-indexes of the TTCI



Source: World Economic Forum (2013)

And finally the (Ei Ei Khin et al)'s 'structural model for measuring attributes competitiveness of Bagan, Myanmar' (2014) is (as shown below in figure 2.8) a destination specific model adapted from almost all of the previous models shown in this paper (i.e. excluding Omerzel Gomezelj & Mihali 's (2008)) by taking into account all the common features these proposed destination competitiveness models share and was developed, as the researchers claim, to measure attributes competitiveness of Bagan, Myanmar, an ancient archaeological site containing over 2000 well preserved ancient temples, pagodas and monuments of the 11th – 13th century.

Figure 2.8 Attributes competitiveness model for Bagan



Source: Ei Ei Khin et al. (2014)

In the model, six main indicators and set of measurements are identified:

1. **Destination Attraction:** Primary appeal of the destination that makes the place attractiveness to visit. Included in this category are Natural and Cultural attractions.
2. **Tourism superstructures:** The specific need that can enhance the attractiveness of the tourism destination such as Accommodation, Food services, Festivals and Events, Special Activities, Entertainments, Shopping, etc.
3. **General infrastructure:** The basic need for every destination including transportation networks, modes of accessibility, ground transportation, financial services, health services, telecommunication services, and electricity supply.
4. **Destination management:** An important framework that works towards matching destination resources to proper strategic planning thereby enhance the competitiveness of destination. Site management, strategy formulation, environmental conservation, human resource development and marketing campaign are included.
5. **Demand condition:** A motivational factor which can stimulate visitation to a destination. Demand condition in this model is presented as more consistent with the concept Dawyer & Kim (2003). Destination awareness, motivation and tourists' perception about destination are included as measurements.
6. **Destination image:** A special factor for destination competitiveness because the actual visitation largely depends on the tourist attitudes towards destination. Cost and value, ensure of safety and security, crowd of tourist and the local hospitality are involved.

Bringing the issue of competitiveness down to specific areas, there is a general agreement that the quality of Africa's resource endowment for tourism is exceptional, but most countries have only barely developed their tourism potential (Iain, 2001). One such country is Ethiopia. A study conducted in 2010 by Yabibal Mulualem, after stating that Ethiopia has immense tourism potential owing to its natural, historical and cultural endowments, shows comprehensive studies are lacking to understand the reasons behind the country's poor performance in the tourism sector. Further to the situation he explains that it is even worse to see Ethiopia, on the one hand, as a country whose tourism potential is diversified: natural attractions that include some of the highest and lowest places in Africa along with immense wild life including some endemic ones; a very old and well preserved historical traditions with fascinating obelisks, churches and castles

to witness that, an attractive cultural diversity of about 80 nations and nationalities; and various ceremonies and rituals of the Ethiopian Orthodox Church which open a window on the authentic world of the Old Testament and on the other hand, as one of the poorly performing countries in terms of tourist arrivals (ibid). In their study about the competitiveness of Ethiopia's tourism (Tegegne, et al., 2014) share the same feeling with Yabibal (2010) by saying '...Ethiopia is one of the ancient African states that displayed millions of year's paleontological records of human history and more than 3000 years of archaeological findings (Tolossa, 2012). It is famous for its ancient human civilization, nine UNESCO world heritage and three Biospheres sites. Despite its colorful culture, long history, hospitable weather and people, it is a country faced natural and manmade challenges resulting in a tourist unfriendly image.' To the positive side of this, Biniyam (2011) states that it is very well addressed that Ethiopia, with its distinct and tremendous wealth of cultural and historic tourism resources, has a huge potential of earning a great deal of benefits out of its tourism.

Despite all the limitations, Ethiopia's tourism industry has been and still continues to be a major source of foreign exchange earnings (UNECA, 2013). In the same report it is stated that the industry is an important export for Ethiopia. Another (WTTC *Travel & Tourism Economic Impact, 2014*) report also shows that the direct contribution of Travel & Tourism to Ethiopia's GDP in 2013 was ETB 35,766.6million (4.2% of GDP). This was forecast to rise by 4.5% to ETB 37,373.6 million in 2014 and it is expected to grow by 4.8% per annum to ETB 59,495.2 million (3.6% of GDP) by 2024.

As the matter narrows to smaller geographic areas, such as North Gondar zone, studies on the issue of tourism destination competitiveness fall from lacking to none, which in turn shows that the subject has not been given any weight and that what could have been turned into opportunity might have simply been wasted.

To ensure that the benefits from increasing globalization are shared, all countries (destinations) need to ensure that they have the necessary level of competitiveness (Dwyer in Jonker, 2004). The first step in achieving this goal is to better understand those forces and success factors that determine the competitiveness of major tourism destinations (ibid). Factors of tourism

competitiveness influence competitiveness in tourism (Anett, 2010). They are also able to increase the competitive edge in tourism (ibid). Only when factors of destination competitiveness are well understood that destination specific factors can be identified and integrated to ensure sustainable growth for the destination within a competitive environment (Jonker, 2004).

Tourism is a wide-ranging system with the origin and destination as two essential components, and the success of tourism competitiveness of a destination is based on how well the supply matches the demand (Uysal and Gunn in Fang, 2006). In an attempt to fill the gap that the zone under study (North Gondar) has on the issue of destination competitiveness, this study identifies important factors of tourist destination competitiveness for the zone and measures the performance of the zone in those factors as a tourist destination from the suppliers' perspective. In doing so, different models of destination competitiveness from existing literature (most importantly, the model developed by Ei Ei, et al., 2014), as discussed above, have been reviewed.

2.6 EMPIRICAL STUDIES

Over the years, several researchers have conducted destination specific studies regarding competitiveness. But, as it was generally recognized, no universal set of items, attributes or indicators (used to measure the competitiveness of tourism destinations) exists (Dwyer, Livaic & Mellor in Simon, 2010) or, in other words, except in some coincidences, there is no one-size-fits-all approach. For that reason, some researchers adapted some attributes of the previously discussed models to match specific situations while others used them as they are.

In addressing the competitive position of a particular destination, supply (destination) side and/or demand (tourist) side views were used by researchers as an approach.

Some countries and regions on whose competitive position empirical studies have been conducted include: Brazil (Benedetti, 2010); Coffs Coast tourism region and the Great Lakes tourism region of East Coast of Australia (Simon, 2010); South Africa (Jonker, 2004); Slovenia (Doris, 2006), 103 Italian regions (Francesca, et al., 2006), 610 small and medium Italian

destinations (Gianluca, 2013); Bagan, Myanmar (Ei Ei Khin, 2014), Mátra Region of Hungary (Annet, 2010); India and Singapore (Archana, 2012); Serbia (Armenski et al., 2011); Asian countries (Chin-Tsai and Ya-Ling, 2009); Costa Rica (Robertico, 2013); Italy (Silvia, 2013); Iceland (Fridrik and Thorhallur, 2011); Caribbean Islands (Leiseth 2010); Turkey (Metin et al, 2006); Hong Kong, Singapore and Bangkok of Asia Pacific (Michael and James, 2005).

The above mentioned studies seem to imply that destinations that enjoy more arrivals and more spending from tourists, or have benefited from a higher market share in the global market than that of others, are considered to be competitive.

2.7 WHY (OR IMPORTANCE OF) ‘DESTINATION COMPETITIVENESS’?

Over the years, tourism has become meaningful to all economies – both developing and developed (VUSSC, no date). The World Tourism Organization (UNWTO) *2014 Edition Tourism Highlights* confirms that over the past six decades, tourism has experienced continued expansion and diversification, becoming one of the largest and fastest-growing economic sectors in the world. An ever increasing number of destinations worldwide have opened up to, and invested in tourism, turning tourism into a key driver of socio-economic progress through export revenues, the creation of jobs and enterprises, and infrastructure development (UNWTO, 2014). The same report also shows that international tourist arrivals reached a significant number of around 1087 million in 2013 (up from up from 1035 million in 2012) whereas international tourism receipts generated around 1159 billion US dollars (873 billion Euros) in the same year, up from US\$ 1078 billion in 2012. According to UNWTO’s long term forecast, international tourist arrivals worldwide are expected to increase by 3.3% a year from 2010 to 2030 to reach 1.8 billion by 2030 (UNWTO, 2014).

At the same time, there has been an increase of attention given to tourism industry by several destinations. Governments, in particular, began to consider tourism as an important source of revenue, but also as a promising industry to increase awareness about their territories, to maintain their traditional cultures and to create jobs, among other effects. Through tourism governments are encouraged to make infrastructure improvements such as better roads, electricity, telephone, and public transport networks, which facilitate tourism, improve the economy’s overall prospects and the quality of life for its residents as well (Benedetti, 2010).

But the world of tourism is shrinking: there is an explosion of tourism products and technological developments, and soon there will be no limits for tourism anywhere (UNWTO, in Benedetti, 2010). With the decrease in the price of airline tickets, many long-haul destinations are becoming more accessible and thus cheaper, whereas the tourists are becoming more demanding. This has led many destinations to realize that this is not a sellers' market: potential tourists have more and more options every year and, as a consequence of the growing experience, they know more (Faulkner et al. in Benedetti, 2010). Though destinations, tourism practitioners and academics have paid more attention to the importance of becoming competitive aiming to improve the life standards of local residents in a sustainable way – without degrading the resources of the destinations – mostly, a common goal of competitiveness is to increase market share (tourist arrival and foreign expenditure) (Crouch and Ritchie; Dwyer and Kim; Craigwell in Benedetti, 2010).

The current tourism market is highly competitive (Piotr, 2014). Increasing globalization, specifically, in the tourism sector in recent decades as well as the increasing significance of the tourism sector in the economies of many nations have made it necessary for local governments to look at the issue of tourist destination competitiveness (Mirosław, 2012). Competition amongst tourist destinations has become more intense in recent years (Annet, 2010) and due to global mobility of tourists the competition is no longer just local, but rather fully global (Lenka, 2009) and also competition is not always a struggle between two or more countries as each geographical part of a country can be in competition individually with other similar foreign regions on the basis of facilities, cultural heritage assets and natural history (Metin, 2000).

Competitiveness is increasingly being seen as a critical influence on the performance of tourism destinations in competitive world markets (Dickinger, in Michael and James, 2005) and that it is now widely accepted as the most important factor determining the long term success of organizations, industries, regions and countries (Kozak and Rimmington in Sebastian, 2003). Chin-Tsai and Ya-Ling (2009) also suggest that a tourism country's (destination's) competitiveness is important especially when countries (destinations) strive for bigger market share. And the degree to which a country (destination) can benefit from its tourism sector depends largely on this sector's competitive position in the international market (Gomezelj and Mihali in Chin-Tsai and Ya-Ling, 2009).

So, as more and more tourism destinations are seeking to understand how competitive they are (Roger 2004), it is important that destinations are able to measure their competitiveness in order to identify their strengths and weaknesses and thereby develop their future strategies (Metin, 2000).

Of course, as a consequence of the foregoing issue, destinations have demonstrated to invest and act more proactively by planning, promoting and executing various activities to attract international tourists to their countries, and all the benefits that come with it. In order to accomplish it, destinations have been using innumerable strategies and tools to outshine other competitor destinations, from improving their infrastructure to executing marketing activities. In this highly competitive environment, these destinations ‘must ensure that their overall attractiveness, and integrity of the experiences they deliver to visitors, must be equal or surpass that of the many alternative destination experiences open to the potential visitors’ (Crouch and Ritchie in Benedetti, 2010).

In this sense, the assessment of competitiveness represents an important and helpful tool for the planning and prioritizing actions; strategic positioning and market analysis of tourism destinations by different stakeholders, which can use the results to ‘improve the industry’s competitiveness in their national economies and consequently contributing to national growth and prosperity’ (Faulkner et al.; WEF in Benedetti, 2010).

And finally, as it has already been said by Crouch and Ritchie (in Doris, 2006), a destination that has a tourism vision, shares the vision among all the stakeholders, has management which develops an appropriate marketing strategy and a government which supports tourism industry with an efficient tourism policy, may be more competitive than one that has never asked what role tourism is to play in its economy.

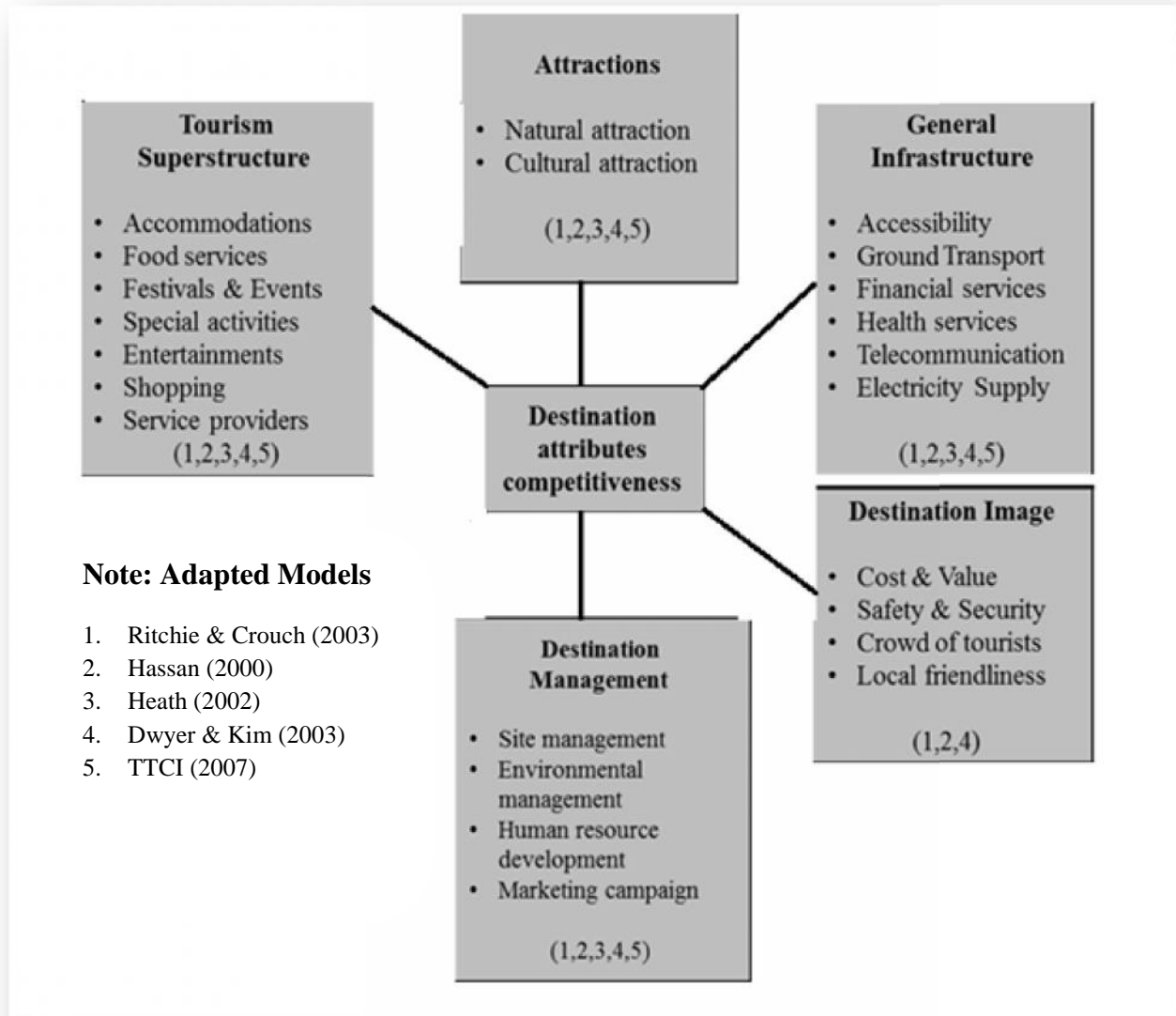
2.8 CONCEPTUAL FRAMEWORK

Based on the major objective and perspective of this study, in this study, destination competitiveness is defined as ‘ability to increase tourism expenditure, to increasingly attract visitors, while providing them with satisfying, memorable experiences and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations’ (Ritchie and Crouch in Gianluca, 2013)

In order to carry out the research on competitiveness of North Gondar zone, a research model was adopted from the authors *Ei Ei Khin et al. (2014)* who have applied the same competitiveness model in Bagan, Myanmar. From the perspective of this study, this model was the most relevant. It brings together the main elements of destination competitiveness as it provides a realistic display of linkages between various elements, which include all relevant determinants that shape and influence a destination by putting together all the common features of most important destination competitiveness models which were previously done and proposed by well known researchers.

All of the connections developed have been retained but a part of the original model, that which linked destination competitiveness attributes to ‘Demand condition’ category, was eliminated (compare figure 2.8 and figure 2.9) for this paper measures competitiveness from a supply-side perspective, not from the tourists’ (demand side).

Figure 2.9 A model of destination competitiveness for North Gondar zone



Source: Adapted from Ei Ei Khin et al. (2014)

CHAPTER THREE

RESEARCH METHODOLOGY

3.1 RESEARCH DESIGN

As this study attempted to obtain information concerning the current status of the phenomena (the competitiveness of North Gondar as a tourist destination) and to describe what exists, it can be categorized as of descriptive nature. More specifically, for there was only one sample of respondents and information was obtained from this sample only once, this study adopted a single cross-sectional descriptive research design.

3.2 THE SETTING

Though many Woredas in the Zone have potential tourism resources, tourism in North Gondar is mainly concentrated in two Woredas, namely Gondar and Debark. These two Woredas are where most tourism service providers and well identified tourism attractions such as Fasil Ghebbi or Fasil Royal Enclosure (a cultural UNESCO world heritage site designated in 1979) and the Semien Mountains National Park (a natural UNESCO world heritage site recognized in 1978) are found. As this study assesses the competitiveness of the zone as an international tourism destination from the suppliers' (service providers') perspective, to focus mainly on tourism stakeholders (hotels, lodges and restaurants; local travel agents, tour guides, government officials, tourism police, university and vocational training center hotel and tourism department lecturers, transport associations, NGOs, Ethiopian airlines) of these two woredas (Gondar and Debark) was found to be appropriate.

3.3 DATA COLLECTION METHOD

Though difficulty of developing accurate survey instruments, probing limitations, lack of control over timeliness, and potentially low response rate are some of the downsides of survey method, compared to observation or other qualitative methods, survey methods allow the collection of significant amounts of data in an economical and efficient manner; and they typically allow for much larger sample sizes. Due to the fact that several tourism stakeholders with varying level experiences and different areas of location were targeted in this study, survey method was found

to be appropriate both for the type of data to be collected and from the point of view of economic and time efficiency as well.

3.3.1 THE QUESTIONNAIRE

A survey instrument (Appendix G) was prepared based on literature review (the model developed by Ei Ei Khin et al., 2014) from the list of factors of tourism destination competitiveness in the way it achieves the objectives of the study. In designing the questionnaire, a five point Likert-type scale was used. The Likert scale is the most widely used form of scaled items where the respondent chooses a point on a scale that best represents his/her view (Allison et al. in Jonker, 2004).

The survey task required participants to make judgments regarding the relative importance of each of the factors of destination competitiveness identified from literature review (the model developed by Ei Ei Khin et al., 2014) and to measure the performance of North Gondar's competitiveness as an international tourist destination in those factors.

3.3.1.1 VALIDITY, RELIABILITY and PRE-TEST

Though Validity issues were resolved considering the fact that the same destination competitiveness factors which were used in this research to measure the competitiveness of North Gondar zone as an international tourism destination were also used to measure competitiveness of Bagan, Myanmar (Ei Ei Khin et al., 2014), to be sure and more accurate, these issues were assessed by and the questionnaire was Pre-tested on research advisors and other 30 tourism professionals respectively. They were asked to provide comments on the layout, content, wording, and understandability, and to edit and improve the items to enhance the clarity, readability and content validity (results on pre-test are shown in Appendix E and F). They were also asked to identify any of the scale items that were redundant with other scale items and to offer suggestions for improving the proposed scale. Based on their suggestions, the items of the measurement scale were revised and reorganized.

Reliability of the resulting data from the survey was subjected to internal consistency measures. When assessing the importance measures of 36 factors, the Cronbach's Alpha was found to be 0.937 (as shown in Table 3.1); regarding the performance measurement of the destination, the

Cronbach's Alpha resulted to be 0.878 (as shown in Table 3.2), which in both cases indicated a high level of internal consistency which then means a high degree of reliability (George and Mallery in Joseph and Rosemary, 2003).

Table 3.1 Reliability Statistics (for Importance)

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.937	.951	36

Table 3.2 Reliability Statistics (for Performance)

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.878	.891	36

3.3.1.2 LAY OUT AND CONTENT OF THE QUESTIONNAIRE

The questionnaire was arranged in five (A4 size) pages –including the introductory (cover) letter. The cover letter with the name and address of the researcher was attached to the questionnaire to explain the purpose of the research.

The questions in the survey were prefaced with detailed instructions to the respondents on the actions required from them to complete the questionnaire properly. The questions were grouped into the following sections:

Section A required general information about the respondents' demographic profile, the classification of the organization they represented and the location of the organization represented, how long they and their organizations had been operating in the tourism industry and the importance attached to the zone's tourism for the existence of their organizations.

Section B was further divided into two sub-sections –**B.1** and **B.2**:

Sub-section **B.1** measured the importance of factors of destination competitiveness with the help of five scales ranging from **1 (very unimportant)** to **5 (very important)**; and

Sub-section **B.2** measured the performance of a destination with the help of five scales ranging from **1 (very low)** to **5 (very high)**.

In section B (specifically sections B.1 and B.2), 36 attributes (factors) of tourism destination competitiveness identified from literature review (most importantly from Ei Ei Khin et al., 2014) were presented. These 36 attributes were grouped into five categories as shown in the questionnaire (Appendix G).

3.3.1.3 ETHICAL CONSIDERATIONS

It was also made clear in the introductory section of the questionnaire that this research would be conducted for academic purpose; all information provided by the respondents would remain confidential and would only be reported as group data with no identifying information.

3.4 SAMPLING

In an attempt to identify the population to be sampled and studied, prior contact was made with concerned individuals, organizations and associations; and tourism officials at zone and woreda levels. This way the main stakeholders, where they were located and other important information were collected as summarized in (Appendix A).

Once the names of stakeholder organizations, where they were located (Gondar or Debark) and their number – a total of 74 (56 or 75.68% of the total organizations from Gondar and the rest 18 or 24.32% of the total organizations from Debark) – was known, the next step was to decide on who to target and how many individuals in each organization (positions of these individuals and in targeted organizations and their number is shown in ‘Appendix A’ under ‘Targets’ column). So, a total of 272 people (186 or 68% of the total population from Gondar and the rest 86 or 31.62% of the total population from Debark) were identified. And then, the next step was to determine the number of those individuals to be included in the sample population which in other words was to determine the sample size.

Once the size of population (272), the sample size (170) was determined using the formula:

$$n = \frac{N}{1 + N(e)}^2$$

Where:

- n = the sample size
- N = the population size and
- e = the level of precision which is ($\pm 5\%$) Where Confidence Level is 95% and $P = .5$.
(Yamane in Israel, 2013 (original publication in 1992, reviewed in 2013))

The actual sample size, of course, happened to be 162:

$$n = \frac{272}{1+272(5\%)} 2 \approx 162$$

The sample size (162) is about 60% of the total population (272). This also means that we should take 60% of all people in each target organization at both locations (Gondar and Debark). This is presented in detail in (Appendix A) under '*Sample/number of representatives (60% of the total target)*'.

Care, however, was taken that fractions were put approximately to the next digit. For example: if the sample size of people working in targeted hotels and pensions in Gondar is 60% of the total number of people in those targeted hotels and pensions (which is 28), then the result (16.8 people) would be shifted to the next digit (which is 17 people). This way, the sample size grew from 111.6 people to 116 people in Gondar and from 51.6 people to 54 in Debark, which leaves us with a total of 170 people in both woredas (116+54).

Regarding the sampling technique, where there was a case in which there were several targeted organizations in one woreda and/or a case in which there were several targeted individuals in one organization to be included in the sample, a simple random probability sampling technique was employed so as to give equal opportunity to all elements in the population.

In this study only those individuals who work for organizations or associations which are highly in contact with tourists on a daily basis or which give highly tourism related services were targeted to be the population of interest.

As participants in the survey were individuals with varying levels of experience and expertise on the topic of destination competitiveness, the researcher used his judgment in deciding who needed to be targeted (general managers, members of associations, lecturers of particular departments, etc) in each organization as shown in (Appendix A).

3.5 DISTRIBUTION OF THE QUESTIONNAIRE

Since the type of survey method was mainly self-administered but when and wherever needed and/or appropriate it was person-administered, prior to the distribution of the questionnaires, two assistants were recruited and trained with the necessary knowledge and skills so that they can help in assisting the respondents by making doubts clear, for example..

A total of 170 questionnaires were distributed to respondents and collected in the period of time between the second half of March and the first half of April 2015.

3.6 THE RESPONSE

Except for those respondents in university departments, all questionnaires were filled out in the presence of the assistants or the researcher. This, coupled with the fact that most respondents belong to tourism related associations (and so can be accessed in groups), contributed to the success of maximum response rate. Therefore, no questionnaire was left unreturned nor was there any unusable.

3.7 SOURCE OF DATA

In an attempt to attack the problem and achieve the ultimate objective of the research (answer the research questions), both a literature study (as a secondary source of data) and an empirical investigation (as a primary source of data) were undertaken.

Secondary source of data

The secondary source of data required a comprehensive study of both international as well as national literature regarding:

- Tourism and tourism destinations
- Competitiveness and tourism destination competitiveness

- Important factors affecting (determining) tourism destination competitiveness
- Importance of competitiveness for tourist destinations

In this regard, for international literature study, relevant articles and books were used. On the other hand, for national literature study both published and unpublished information on all aspects concerning North Gondar's tourism industry was utilized.

Primary source of data

As indicated in the previous sections, the goal of this study was to identify the important factors that influence the competitiveness of North Gondar zone as a tourism destination and to measure the performance of the zone in these factors from the suppliers' perspective. This was achieved by conducting an empirical survey that used factors of destination competitiveness from different models of the literature review (most importantly, the model developed by Ei Ei, et al., 2014)

3.8 DATA ANALYSIS TECHNIQUES

The final results of the survey were analyzed electronically. All the data collected from the respondents was entered to and analyzed on a computer and then tabulated discussed with the help of importance-performance analysis (IPA) grid which uses the mean importance and performance scores from the five-point scale survey and provides a clearer understanding of what factors (attributes) North Gondar zone is more competitive with or where it is less competitive and needs improvement. Since the survey questions are going to be Likert-type scale, the responses will be analyzed quantitatively.

The quantitative data obtained from the survey (to identify the importance of destination competitiveness factors and performance of destination in each factor) was handled in two ways:

- Using the statistical software SPSS to analyze means, medians, modes standard deviations, frequency distributions and percentages, and
- IPA (Importance-Performance Analysis)

In this study, descriptive statistics such as means, standard deviations, frequency distributions, and percentages are used. Though the numerical data that emerged from the survey and which is shown in the tables that are presented onwards in this study considered the mean value of the response, in order to provide a further insight on the mean values of the responses, the mode, median and standard deviation values are also presented. All this was conducted with the help of a computerized statistical package, SPSS 16.0.

The mode represents the number that occurs most frequently in the data set, in other word, if the option '5' on the Likert scale was the most selected one by the respondents in a given factor, then the mode value of that factor would be '5'. If multiple modes exist, then the smallest value is shown.

The median, on the other hand, corresponds to the actual middle number when data is put in order. For example, if the responses for a given factor are put in order '1-1-2-2-4-5' then the median value in the factor would be '2'. If there are two median values, the average of them is calculated.

Lastly, standard deviation refers to how spread out the data points are. An item with low standard deviation has most of the data points centered around the average, whereas in the one with a high standard deviation ha data points that are not so clustered around the average.

3.8.1 IPA (Importance-Performance Analysis)

The application of IPA was introduced by Martilla and James in 1977 (Parikshat, 1010) as a useful tool to provide management insights to identify company strengths and weaknesses for improving company performance (Yu-Chuan and Shinyi, 2013). In other words, it has shown the capability to provide service managers with valuable information for both satisfaction measurement and the efficient allocation of resources, all in an easily applicable format (Wade and Eagles, 2003).

This technique identifies strengths and weaknesses of a destination (in the case of this study) in terms of two criteria that respondents are presented with. One criterion is the relative importance

of attributes. The other is respondents' evaluation of the performance of the destination in terms of those attributes. It starts with an identification of a list of attributes (36 attributes in the case of this study) that are relevant to the situations chosen to be investigated (Nale et al. in Nurazariah and Salina, 2012). The list of attributes can be developed after investigating the relevant literature, conducting focus group interviews, etc (Krisana 2004). After determining those attributes that are worthy of subsequent examination, concerned bodies are asked two questions: one relates to the importance of the attributes and the other to the destination's own performance measured in terms of these attributes (ibid).

By using the central tendency measure such as mean, importance and performance scores are ordered and classified into high or low categories, and then by pairing these two sets of rankings, each attribute is placed into one of the four quadrants that are displayed graphically using an importance-performance matrix as in Figure 3.1 (Eskildsen & Kristensen in Nurazariah and Salina, 2012).

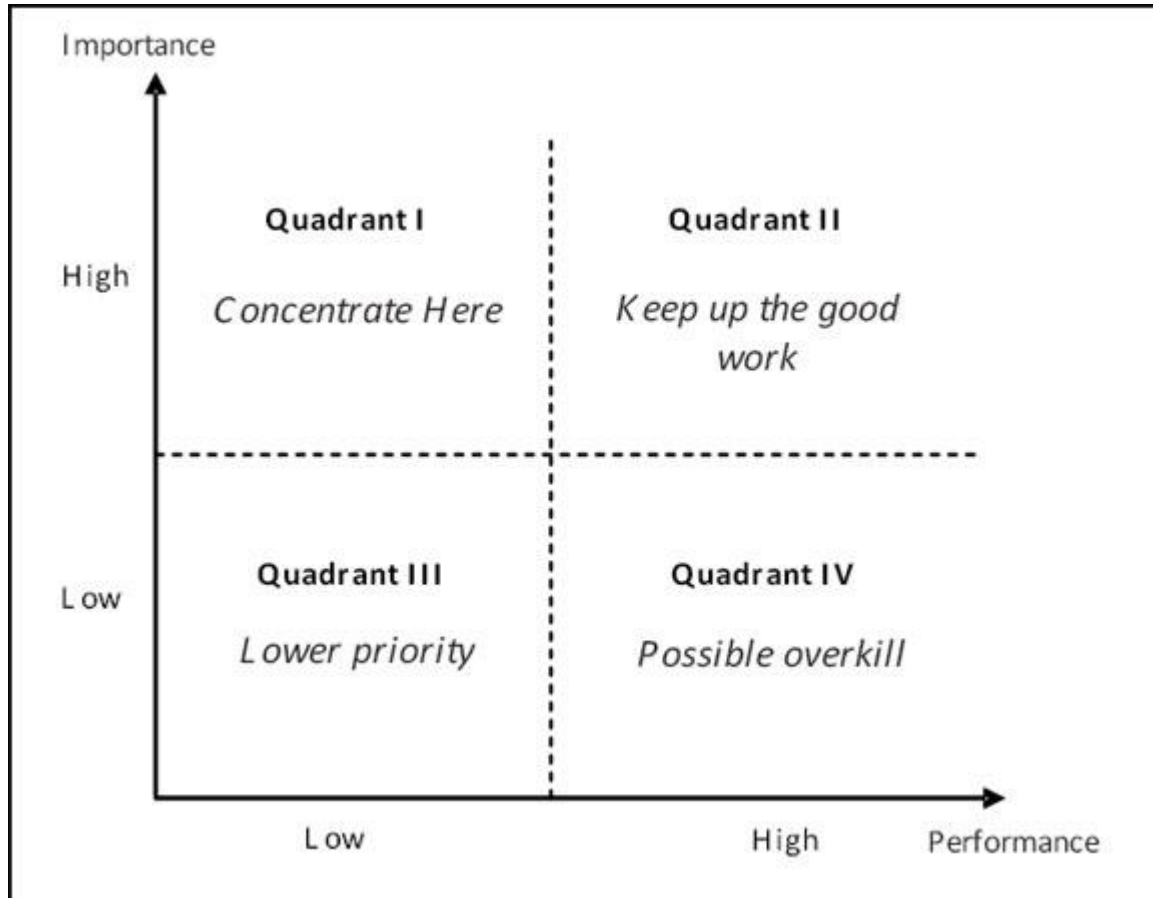
With little modification, IPA has been applied to a diverse range of contexts including banking, education, dentistry, health care, hotels, in a tourism/outdoor recreation context, and has been applied to special events such as municipal marathons, ski resorts, escorted tours, etc (Yavas & Shemwell; Wade & Eagles; Nale et al.; O'Neill & Palmer; Ennew et al.; Ford et al. in Nurazariah and Salina, 2012; Ennew et al.; Nitse & Bush; Dolinsky & Caputo; Guadagnolo; Hudson & Shepherd; Uysal et al.; Duke & Persia; Martin; in Wade & Eagles, 2003).

The IPA model is divided into four quadrants, with importance on the y-axis and performance on the x-axis. The four-quadrant IPA matrix is shown in Figure 3.1. Quadrant I is labeled "Concentrate Here," with high importance/low performance, indicating that the destination has been performing poorly and requires improvement to be a top priority. Quadrant II is labeled "Keep Up the Good Work," with high importance/high performance, which indicates that the destination has been performing well to gain competitive advantage.

Quadrant III is labeled "Low Priority," with low importance/low performance. Any attributes falling into this quadrant are non-important and pose no threat to destinations. Quadrant IV is labeled "Possible Overkill," with low importance/high performance, indicating that respondents

are satisfied with the performance, but the specific attribute is relatively non-important. In this situation, the responsible body should allocate more resources to manage attributes that reside in Quadrant (Nurazariah and Salina, 2012; Tzung-Cheng and Jay, 2005; Gwo-Hshiung and Hung-Fan, 2011; Yu-Chuan and Shinyi, 2013; Parikshat, 2010).

Figure 3.1 IPA model



Source: Gwo-Hshiung and Hung-Fan, 2011

CHAPTER FOUR

RESEARCH FINDINGS AND DISCUSSION

4.1 GENERAL INFORMATION ABOUT RESPONDENTS

General information regarding respondents' demographic profile, their distribution by type of organization they work for, how long they and their organizations had been operating in the tourism industry, location of their organizations and what level of importance they attach to North Gondar's tourism for their organization's existence is shown in Table 4.1.

From out of 170 respondents, as shown in Table 4.1, 162 (95.3%) were male respondents while the rest 8 (4.7%) were female respondents which shows minimum level of female participation in North Gondar's tourism industry.

Most respondents (116 or 68.2%), as shown in Table 4.1, were in the age group of 25-34 years. The age group that has the next largest number of respondents (30 or 17.6%) is 35-44 years. A small number of respondents (5 or 2.9%) belong to the age group 55-64 years, while the third largest (10 or 5.9%) and fourth largest (9 or 5.3%) age groups are 45-54 years and 18-24 years respectively.

The majority of the respondents 85 (50%) were bachelor's degree holders followed by the diploma holders (43 or 25.3%). 1 (0.6 %) respondent had a certificate while 29 (17.1 %) were high school graduates. The rest 12 (7.1%) were above degree. This shows that more than 82.4% of the respondents had diploma and above which in turn shows high educational attainment of participants.

Marital status of respondents is summarized in Table 4.1 as: the majority of the respondents 98 (57.6%) were single whereas 70 (41.2%) respondents were married and the rest 2 (1.2%) were widowed.

Table 4.1 General information of respondents N=170

		Freq	%			Freq	%
Gender	Male	162	95.3%	Type of organization	Accommodation facility	26	15.3%
	Female	8	4.7%		Airlines	1	.6%
Age	18-24	9	5.3%		Distribution channel	7	4.1%
	25-34	116	68.2%		Educational center	18	10.6%
	35-44	30	17.6%		Government tourism office	3	1.8%
	45-54	10	5.9%		Ground transport association	24	14.1%
	55-64	5	2.9%		NGO	3	1.8%
	age 65 or older				Religious center	2	1.2%
					Restaurant	2	1.2%
Education	Less than high school				Tour guides association	75	44.1%
	High school	29	17.1%	Respondents' experience in the tourism industry	Tourism police association	9	5.3%
	Certificate	1	.6%		1-5 years	89	52.4
	Diploma	43	25.3%		6-10 years	39	22.9
	Bachelor's degree	85	50.0%		Longer than 10 years	42	24.7
	Above degree	12	7.1%	Location	Gondar	116	68.2
Marital status	Single	98	57.6%		Debarq	54	31.8
	Married	70	41.2%	Years of organizations' operation in tourism	1-5 years	55	32.4
	Widowed	2	1.2%		6-10 years	26	15.3
	Divorced				Longer than 10 years	89	52.4
	Separated						

Note: areas with no values are shaded in gray

Source: researcher's own survey

When categorized (as in Table 4.1) under the type of organization, association or department in which respondents were working, the majority 75 (44.1%) respondents were from tour guides association, 26 (15.3%) respondents belonged to accommodation facility, 24 (14.1%) were from ground transport association, 18 (10.6%) were from educational center (either hotel and tourism departments of university or vocational training center), 9 (5.3%) respondents were from tourism police association, 7 (4.1%) were from distribution channels such as local travel agents, equal number (3 or 1.8%) of respondents were from government tourism offices and NGOs, another equal number (2 or 1.2%) of respondents were from religious centers (Ethiopian orthodox churches) and restaurants; and finally the least number (1 or 0.6%) respondent was from Ethiopian airlines (Gondar branch).

How long each of the participants had been working in the tourism industry is also presented in Table 4.1: most respondents (89 or 52.4%) had 1-5 years of experience in the tourism industry, the second largest number (42 or 24.7%) of participants had longer than 10 years of experience, and the rest 39 (22.9%) respondents had 6-10 years of experience. This shows that almost half (47.6%) of the respondents had at least 6 and above years of experience in the tourism industry.

As also shown in Table 4.1 above, 116 (68.2%) respondents' organizations (also departments and associations) in which the participants worked were located in Gondar while the rest 54 (31.8%) respondents' organizations were located in Debarq. This highlights that there is a high concentration of the zone's (North Gondar's) tourism stakeholders (suppliers) in Gondar.

The preceding table (Table 4.1) also shows how long the organizations (also associations and departments) in which the respondents were working had been in operation in the tourism industry. The majority of the respondents (89 or 52.4%) worked in organizations which had been operating in the tourism industry for longer than 10 years. 55 (32.4%) respondents worked for organizations that had been in operation in the tourism industry for 1-5 years while the rest 26 (15.3%) participants worked for organizations which had been operating in the tourism industry for 6-10 years. The Table generally shows that 67.7% of the respondents worked for organizations which had been in operation in the tourism industry for at least 6 years and above.

As summarized in Table 4.2, 158 (92.9%) out of 170 respondents saw North Gondar (as a tourism destination) as 'currently very important' for the existence of their organization while 10 (5.9%) and 2 (1.2%) respondents saw the zone's tourism industry as 'of increasing importance' and 'of diminishing importance' respectively, for the existence of their organization. Additionally, from the four response alternatives (**1=Very important, 2=Of increasing importance, 3=Of diminishing importance and 4=Not important**) presented to the respondents – about the importance of North Gondar zone (as a tourism destination) – the most selected response alternative (or mode, as shown in Table 4.2) was '1' which is 'very important' with a mean value of 1.08 and standard deviation 0.32. This shows strong agreement among the respondents that they all believe (with a very small variation) that North Gondar as a tourism destination is really very important for the existence of their organization.

Table 4.2 views of respondents on the importance of destination's tourism for the existence of their organization N=170

	Response alternatives	Freq	%	Mean	Median	Mode	St dv*
Current importance of destination's tourism for organizations	Very important	158	92.9%	1.08	1.00	1.00	.32
	Of increasing importance	10	5.9%				
	Of diminishing importance	2	1.2%				
	Not important						
Future importance of destination's tourism for organizations	Very important	157	92.4%	1.08	1.00	1.00	.30
	Of increasing importance	12	7.1%				
	Of diminishing importance	1	.6%				
	Not important						

Note: St dv*=Standard deviation; light gray shaded areas show no values.

Source: researcher's own survey

The above table (Table 4.2) also shows similar future importance of North Gondar (as a tourism destination) for the existence of respondents' organizations: 157 (92.4%) participants said the zone (as a tourism destination) is very important for their organization. In other words, as shown in the table, from a given set of response alternatives, response alternative '1' ('very important') was the most selected (see the mode).

The mean is 1.08 which is almost '1' and this was chosen with a small standard deviation of 0.3 which shows strong agreement and very small difference among participants' views. Those who saw a lesser degree of future importance include 12 (7.1%) respondents who chose the 'of increasing importance' and 1 (0.6) respondent who picked the 'of diminishing importance'.

4.2 IMPORTANCE OF FACTORS OF DESTINATION COMPETITIVENESS

Here, the views of respondents on the importance of a given set of factors which (directly or indirectly) affect the competitiveness of North Gondar zone as an international tourism destination are presented. In total, 36 attributes were identified from literature review (Ei Ei Khin et al 2014). These attributes or factors were then grouped into five categories. About the importance of each attribute (factor), respondents were presented with five response alternatives

to choose from: 1=**Very unimportant**, 2=**Unimportant**, 3=**Neutral**, 4=**Important**, 5=**Very important**. It is also important to note that in all the following text under this topic, the mean values are interpreted in the following manner: if the mean value of a particular attribute or category is in the range between:

- 1.00 and 1.49, then it means that the attribute is perceived by the respondents as ‘Very unimportant’
- 1.50 and 2.49, then it means that the attribute is perceived by the respondents as ‘Unimportant’
- 2.50 and 3.49, then it means that respondents are ‘Neutral’
- 3.50 and 4.49, then it means that the attribute is perceived by the respondents as ‘Important’
- 4.50 and 5.00 then it means that the attribute is perceived by the respondents as ‘Very important’.

Results on how many respondents (what percentage of the respondents) chose which of the above response alternatives for a given factor is summarized in Appendix B and discussed under five headings. Also, the values of the grand means and standard deviations for each category are shown below (Table 4.3) and then discussed at the end each category.

Table 4.3 Category means and standard deviations

Importance			
No	Attributes category	Mean	Standard deviation
1	Destination Attractions	4.83	0.12
2	Tourism Superstructure	4.80	0.22
3	General Infrastructure	4.91	0.03
4	Destination Management	4.91	0.05
5	Destination Image	4.84	0.14

Source: researcher’s own survey

4.2.1 DESTINATION ATTRACTIONS

Under this category, there are seven attributes (as shown in Appendix B and Table 4.4) namely, Comfortable climate for tourism, Natural landscape, Wonderful scenery, Cultural and historical

attractions, Artistic and architectural design, Traditional art and crafts and Exotic and unique local custom. Views of participants on the importance of these attributes is presented and discussed below:

4.2.1.1 Comfortable climate for tourism

As shown in Appendix B and Table 4.4, of the given five response alternatives, respondents chose only two: ‘Very important’ and ‘important’. The majority of respondents who chose ‘Very important’ accounted for 159 (93.5%) and those who chose ‘important’ were 11 (6.5%) in number. In other words, the most selected response alternative was ‘5’ (‘Very important’) (see the mode section of Table 4.4). The mean is ‘4.94’ and the standard deviation is 0.25 which is very small and showing a strong agreement between the respondents on the high importance of the attribute (comfortable climate for tourism) for the zone (North Gondar) to be competitive in the international tourism market.

4.2.1.2 Natural landscape

The Table below (Appendix B and Table 4.4) indicates that a great deal of the participants (163 or 95.9%) chose response alternative ‘5’ (see the mode) which is ‘Very Important’. The mean value of the score is 4.95 (almost ‘5’) and the standard deviation is 0.27 which is very small and shows that respondents believe natural landscape is very important for North Gondar zone to be competitive as a destination in the international tourism market. Other respondents who stayed neutral were 2 (1.2%) and those who chose ‘important’ were 5 (2.9%).

4.2.1.3 Wonderful scenery

This particular factor was seen by the respondents as ‘very important’ (as Appendix B and Table 4.4 suggest) because response alternative ‘5’ was chosen with the highest frequency – 161 respondents (94.7%). The ‘mode’ also strengthens this as it shows that the most selected response alternative was ‘5’ which, of course, is ‘very important’. The mean value of the scores is 4.94 which also reinforce the high importance of the factor. And finally, the standard deviation (0.26) ascertains there is a very small variation among the respondents about the importance of the factor for the competitiveness of North Gondar as a tourism destination.

Table 4.4 Results on the respondents' view of the importance of factors of destination competitiveness – DESTINATION ATTRACTIONS N=170

No	Factors/Attributes	Importance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Comfortable climate for tourism							11	6.5	159	93.5	4.94	5.00	5.00	.25
2	Natural landscape					2	1.2	5	2.9	163	95.9	4.95	5.00	5.00	.27
3	Wonderful scenery					1	.6	8	4.7	161	94.7	4.94	5.00	5.00	.26
4	Cultural and historical attractions					2	1.2	19	11.2	149	87.6	4.86	5.00	5.00	.38
5	Artistic and architectural design					1	.6	49	28.8	120	70.6	4.70	5.00	5.00	.47
6	Traditional art and crafts					3	1.8	45	26.5	122	71.8	4.70	5.00	5.00	.50
7	Exotic and unique local custom			1	.6	4	2.4	33	19.4	132	77.6	4.74	5.00	5.00	.53

Note:

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1*= Very unimportant, 2*= Unimportant, 3*= Neutral, 4*= Important, 5*= Very important
- Sd*=Standard deviation

Source: researcher's own survey

4.2.1.4 Cultural and historical attractions

From the five response alternatives presented to respondents, three were selected (as shown in Appendix B and Table 4.4) but the most selected response alternative (as the mode indicates) was '5' which is 'very important' and it was selected by 149 (87.6%) respondents. With a mean value of 4.86 and standard deviation 0.38, it is clear that in the respondents' mind, cultural and historical attractions hold a very important place for the competitiveness of North Gondar.

4.2.1.5 Artistic and architectural design

This attribute was viewed by the respondents as a 'very important' one, as most of them selected response alternative '5' (see the mode section of Appendix B and Table 4.4). Although other response alternatives such as 'neutral' and 'important' were chosen by 1 (0.6%) and 49 (28.8%)

respondents respectively, a large number (120 or 70.6%) of them saw a very high importance of the attribute for the competitiveness of North Gondar zone as a tourism destination in the international market. For further information, the mean (4.70), median (5) and standard deviation (0.47) are given and all suggest a strong feeling of respondents towards the high importance of the factor.

4.2.1.6 Traditional art and crafts

The result on the importance of this factor (see Appendix B and Table 4.4) shows that out of 170 respondents, 122 (71.8%) individuals selected the 5th response alternative (see the mode) which suggests that the factor is very important. The next response alternative chosen by a large number (45 or 26.5%) of respondents is response alternative '4' ('important'). The average (mean) response alternative selected was 4.7 with a small standard deviation of 0.5. Altogether, the high importance this factor holds in the views of respondents is clearly visible.

4.2.1.7 Exotic and unique local custom

For this particular attribute, only 1 (0.6%) participant selected the 'unimportant' option; 4 (2.4%) respondents chose the 'neutral' response alternative; 33 (19.4%) respondents selected the 'important' option while the majority, 132 (77.6%) respondents, chose the 'very important' response alternative which definitely shows that the factor is highly important for North Gondar to be competitive in the international tourism market as a tourism destination. The mean (4.74), median (5) and standard deviation (0.53) all show the attribute is very important in the views of respondents.

In conclusion (as shown in Table 4.3), the grand mean value of the category (Destination attractions) is 4.83 which means that the respondents saw a high importance of all the seven attributes combined, and the standard deviation (0.12) which is very small also suggests that there is a minor difference among the respondents' view on the importance of the category. The mean value of individual attributes under this category ranged from the least 4.70 (both Artistic & architectural design, and Traditional art & crafts) to the highest 4.95 (comfortable climate).

4.2.2 TOURISM SUPERSTRUCTURE

Under this category, there are eight attributes (as shown in Appendix B and Table 4.5) namely, Variety of accommodation, Quality service in accommodation, Variety of food and beverage services, Quality services in food and beverage services, Variety of evening entertainment, Tourism activities, Variety of shopping items and Presence of service providers. Views of participants on the importance of these attributes is presented and discussed below:

4.2.2.1 Variety of accommodation

As indicated in (Appendix B and Table 4.5), the majority of the participants (158 or 92.9%) chose response alternative '5' (see also the mode) which is 'Very Important'. The mean value of the scores is 4.91 (almost '5') and the standard deviation is 0.36 which is very small and shows that respondents believe variety of accommodation is very important for North Gondar zone to be competitive as a destination in the international tourism market. The respondent who stayed neutral was only 1 (0.6%) and those who chose 'important' were 10 (5.9%).

4.2.2.2 Quality service in accommodation

As shown in Appendix B and Table 4.5, of the given five response alternatives, respondents chose only three: 'Very important', 'important', and 'unimportant'. Those who chose 'Very important' accounted for the majority 164 (96.5%) of the respondents, those who chose 'important' were 5 (2.9%), and the one who chose 'unimportant' was only 1 (0.6%) in number. In other words, the most selected response alternative was '5' ('Very important') (see the mode section of Appendix B and Table 4.5). The mean is 4.95 and the standard deviation is 0.28 which is very small and showing a strong agreement between the respondents on the high importance of the attribute (quality service in accommodation) for the zone (North Gondar) to be competitive in the international tourism market.

4.2.2.3 Variety of food and beverage services

This attribute was viewed by the respondents as a 'very important' one, as most of them selected response alternative '5' (see the mode section of Appendix B and Table 4.5). Although other response alternatives such as 'unimportant', 'neutral' and 'important' were chosen by 1 (0.6%), 1 (0.6%) and 10 (5.9%) respondents respectively, a huge number 158 (92.9%) of respondents saw a very high importance of the attribute for the competitiveness of North Gondar zone as a

tourism destination in the international market. For further information, the mean (4.91), median (5) and standard deviation (0.36) are given and all suggest a strong feeling of respondents towards the high importance of the factor.

Table 4.5 Results on the respondents' view of the importance of factors of destination competitiveness – TOURISM SUPERSTRUCTURE N=170

No	Factors/Attributes	Importance										Mean	Median	Mode	Sd*
		1 *		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Variety of accommodation			1	.6	1	.6	10	5.9	158	92.9	4.91	5.00	5.00	.36
2	Quality service in accommodation			1	.6			5	2.9	164	96.5	4.95	5.00	5.00	.28
3	Variety of food and beverage services			1	.6	1	.6	10	5.9	158	92.9	4.91	5.00	5.00	.36
4	Quality services in food and beverage services			1	.6			6	3.5	163	95.9	4.95	5.00	5.00	.29
5	Variety of evening entertainment	1	.6	1	.6	3	1.8	101	59.4	64	37.6	4.33	4.00	4.00	.60
6	Tourism activities					1	.6	57	33.5	112	65.9	4.65	5.00	5.00	.49
7	Variety of shopping items			1	.6			30	17.6	139	81.8	4.81	5.00	5.00	.44
8	Presence of service providers					1	.6	11	6.5	158	92.9	4.92	5.00	5.00	.29

Note:

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1*= Very unimportant, 2*= Unimportant, 3*= Neutral, 4*= Important, 5*= Very important
- Sd*=Standard deviation

Source: researcher's own survey

4.2.2.4 Quality services in food and beverage services

Of all (170) respondents, the majority 163 (95.9%), selected the 5th response alternative (see also the mode) which explains that a very high importance was attached to the attribute by the respondents. The mean value of the scores is 4.95 and the standard deviation is 0.29, all leading to the conclusion that the respondents viewed the attribute as 'very important'.

4.2.2.5 Variety of evening entertainment

Respondents' view on this factor was a bit different from all of those mentioned above in that a small number (compared to previous ones) of them (64 or 37.6%) selected the 5th ('very important') response alternative. But still, it holds importance in their mind that the majority (101 or 59.4%) of them chose the 'important' response alternative. So, the mode (most selected choice) is '4' and the mean is 4.33, which is even a bit more than saying 'important'. The standard deviation (0.6) also shows that there was little variation between the respondents on their view of the factor as important for the competitiveness of the zone.

4.2.2.6 Tourism activities

This attribute was seen by the respondents as a 'very important' one as the frequency shows – most respondents (112 or 65.9%) chose response alternative '5' while a second significant number of respondents (57 or 33.5%) selected the 4th response alternative (which is 'important'). With a mean value of 4.65 and a standard deviation 0.49, the factor was perceived as more than 'important'.

4.2.2.7 Variety of shopping items

Almost all respondents selected the 4th and 5th response alternatives which are, of course, 'important' and 'very important'. In other words 139 (81.8%) said the factor is 'very important' while 30 (17.6%) said it is 'important'. This is again reflected in the mean and standard deviation values: 4.81 and 0.44 respectively, which can all lead to a conclusion that respondents saw the attribute as 'very important' with a small variation.

4.2.2.8 Presence of service providers

With only 1 (0.6%) individual selecting the 'neutral' response alternative and the rest choosing either 'important' (11 or 6.5%) or 'very important' (158 or 92.9%) (see Appendix B and Table 4.5), this attribute was seen by respondents as a very important factor that could influence the competitiveness of North Gondar zone as a tourism destination in the international market. The mean (4.92) and the standard deviation (0.29) also inform that with a small variation of views the respondents perceived a very high importance of the attribute.

In conclusion (as shown in Table 4.3), the grand mean value of the category (Tourism superstructure) is 4.80 which means that the respondents saw a high importance of all the eight attributes combined, and the standard deviation (0.22) which is very small also suggests that there is a minor difference among the respondents' view on the importance of the category. The mean value of individual attributes under this category ranged from the lowest 4.33 (Variety of evening entertainment) to the highest 4.95 (both Quality service in accommodation and Quality services in food and beverage services).

4.2.3 GENERAL INFRASTRUCTURE

Under this category, there are six attributes (as shown in Appendix B and Table 4.6) namely, Various modes of transport, Smooth transportation within destination, Banking and financial services, Telecommunication services, Electric supply and Infrastructure to meet visitors needs. Views of participants on the importance of these attributes is presented and discussed below:

4.2.3.1 Various modes of transport

As with the other previous attributes, the participants saw high importance in this factor: the majority (154 or 90.6%) of the respondents said it is 'very important' while other (14 or 8.2%) individuals said the factor is 'important'. Those who were 'neutral' accounted for 1.2%. Given this with a mean value of 4.89 and standard deviation 0.34 we can conclude that respondents saw high importance in the attribute.

4.2.3.2 Smooth transportation within destination

As summarized in Appendix B and Table 4.6, this attribute was viewed by the respondents as having a great importance for the competitiveness of the zone as a tourism destination: a great deal (152 or 89.4%) of respondents selected the 'very important' response alternative which is '5' (see also the mode) while 15 (8.8%) individuals chose response alternative '4' which is the 'important' response alternative. The mean value of the scores is 4.88 (well above 'important' and very close to 'very important') and the standard deviation is 0.38 which is very small and shows there is little variation between respondents on the view that this particular attribute is very important to North Gondar to be competitive as a tourism destination in the international tourism market.

4.2.3.3 Banking and financial services

Banking and financial services for the competitiveness of the zone was seen by respondents as a very important factor as the majority of the respondents (160 or 94.1%) said it is ‘very important’ and 9 people (5.3% of the respondents) said it is ‘important’. The average response alternative chosen by the participants was 4.94 (see the mean) which is close to the ‘5’ (the ‘very important’ response alternative) and, of course, the most selected response alternative was ‘5’ (see the mode in Appendix B and Table 4.6). The standard deviation is very small (0.27) which reveals that there was little variation among respondents on the view of the importance of the factor.

Table 4.6 Results on the respondents’ view of the importance of factors of destination competitiveness – GENERAL INFRASTRUCTURE N=170

No	Factors/Attributes	Importance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Various modes of transport					2	1.2	14	8.2	154	90.6	4.89	5.00	5.00	.34
2	Smooth transportation within destination					3	1.8	15	8.8	152	89.4	4.88	5.00	5.00	.38
3	Banking and financial services					1	.6	9	5.3	160	94.1	4.94	5.00	5.00	.27
4	Telecommunication services					2	1.2	14	8.2	154	90.6	4.89	5.00	5.00	.34
5	Electric supply					2	1.2	7	4.1	161	94.7	4.94	5.00	5.00	.29
6	Infrastructure to meet visitors needs					1	.6	9	5.3	160	94.1	4.94	5.00	5.00	.27

Note:

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1*= Very unimportant, 2*= Unimportant, 3*= Neutral, 4*= Important, 5*= Very important
- Sd*=Standard deviation

Source: researcher’s own survey

4.2.3.4 Telecommunication services

Three response alternatives were picked by the respondents for this particular attribute: ‘neutral’ (by 2 individuals or 1.2% of the total respondents), ‘important’ (by 14 individuals or 8.2% of the

total respondents) and ‘very important’ (by the most (154) individuals or 90.6% of the total respondents) showing how really important the factor is for the competitiveness of the zone. The values of the mean and standard deviation are 4.89 and 0.34 respectively (see Appendix B and Table 4.6) which reflect the fact that the attribute is very important.

4.2.3.5 Electric supply

As shown in Appendix B and Table 4.6, of the given five response alternatives, respondents chose three: ‘neutral’, ‘important’, and ‘very important’. Those who chose ‘Very important’ accounted for the majority (161 or 94.7%), those who chose ‘important’ were 7 (4.1%), and who chose ‘neutral’ were only 2 (1.2%) in number. In other words, the most selected response alternative was ‘5’ (‘Very important’) (see the mode section of Appendix B and Table 4.6). The mean is 4.94 and the standard deviation is 0.29 which is very small and showing a strong agreement between the respondents on the importance of the attribute for the zone (North Gondar) to be competitive in the international tourism market.

4.2.3.6 Infrastructure to meet visitors needs

Other elements of infrastructure such as water supply, health facilities, etc were viewed by the respondents as very important ones. As shown in Appendix B and Table 4.6, the ‘very important’ response alternative was chosen by the majority (160) individuals who accounted for 94.1% of the total participants, and those who said the factor is ‘important’ were 9 (5.3%). The mean (4.94) and the standard deviation (0.27) all suggest a strong opinion (with little difference) of the respondents about the importance of the attribute for the competitiveness of the zone as a tourism destination.

In conclusion (as shown in Table 4.3), the grand mean value of the category (General infrastructure) is 4.91 which means that the respondents saw a high importance of all the six attributes combined, and the standard deviation (0.03) which is very small also suggests that there is a minor difference among the respondents’ view on the importance of the category. The mean value of individual attributes under this category ranged from the lowest 4.88 (Smooth transportation within destination) to the highest 4.94 (Banking and financial services, Electric supply and Infrastructure to meet visitors needs).

4.2.4 DESTINATION MANAGEMENT

Under this category, there are eleven attributes (as shown in Appendix B and Table 4.7) namely, Cleanliness in destination, Safety and security, Public bathrooms and restrooms, Multilingual signage, Easy access to get destination map/leaflets, Favorable policies to tourists, Cultural heritage preservation, Conservation of local tradition, Environmental conservation, Efficiencies of tourism and hospitality staff and Use of IT in destination. Views of participants on the importance of these attributes is presented and discussed below:

4.2.4.1 Cleanliness in destination

From all (170) respondents, the majority 158 (92.9%), selected the 5th response alternative (see also the mode) which explains that a very high importance was attached to the attribute by the respondents. The mean value of the scores is 4.90 and the standard deviation is 0.42, all leading to the conclusion that the respondents viewed the attribute as ‘very important’.

4.2.4.2 Safety and security

Safety and security for the competitiveness of the zone was seen by respondents as a very important factor as the majority of the respondents (165 or 97.1%) said it is ‘very important’ and 4 people (2.4% of the respondents) said it is ‘important’. The average response alternative chosen by the participants was 4.96 (see the mean in Appendix B and Table 4.7) which is close to the ‘5’ (the ‘very important’ response alternative) and, of course, the most selected response alternative was ‘5’ (see the mode in Appendix B and Table 4.7). The standard deviation is very small (0.21) which reveals that there was little variation among respondents on the view of the high importance of the factor.

4.2.4.3 Public bathrooms and restrooms

As indicated in (Appendix B and Table 4.7), the majority of the participants (157 or 92.4%) chose response alternative ‘5’ (see also the mode) which is ‘Very important’. The mean value of the scores is 4.91 (above the ‘important’ response alternative) and the standard deviation is 0.34 which is very small and shows that respondents believe Public bathrooms and restrooms are very important for North Gondar zone to be competitive as a destination in the international tourism

market. Another respondent who said the attribute is unimportant was 1 (0.6%) and those who chose ‘important’ were 12 (7.1%).

Table 4.7 Results on the respondents’ view of the importance of factors of destination competitiveness – DESTINATION MANAGEMENT N=170

No	Factors/Attributes	Importance										Mean	Median	Mode	Sd*
		1 *		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Cleanliness in destination			2	1.2	1	.6	9	5.3	158	92.9	4.90	5.00	5.00	.42
2	Safety and security					1	.6	4	2.4	165	97.1	4.96	5.00	5.00	.21
3	Public bathrooms and restrooms			1	.6			12	7.1	157	92.4	4.91	5.00	5.00	.34
4	Multilingual signage					3	1.8	32	18.8	135	79.4	4.78	5.00	5.00	.46
5	Easy access to get destination map/leaflets			1	.6	1	.6	16	9.4	152	89.4	4.88	5.00	5.00	.40
6	Favorable policies to tourists					2	1.2	13	7.6	155	91.2	4.90	5.00	5.00	.34
7	Cultural heritage preservation					1	.6	6	3.5	163	95.9	4.95	5.00	5.00	.24
8	Conservation of local tradition					1	.6	8	4.7	161	94.7	4.94	5.00	5.00	.26
9	Environmental conservation			1	.6	1	.6	7	4.1	161	94.7	4.93	5.00	5.00	.34
10	Efficiencies of tourism and hospitality staff			1	.6			8	4.7	161	94.7	4.94	5.00	5.00	.31
11	Use of IT in destination			1	.6			15	8.8	154	90.6	4.89	5.00	5.00	.36

Note:

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1*= Very unimportant, 2*= Unimportant, 3*= Neutral, 4*= Important, 5*= Very important
- Sd*=Standard deviation

Source: researcher’s own survey

4.2.4.4 Multilingual signage

This attribute was seen by the respondents as a ‘very important’ one as the frequency shows – most respondents (135 or 79.4%) chose response alternative ‘5’ while a considerable number of respondents (32 or 18.8%) selected the 4th response alternative (which is ‘important’). With a mean value of 4.78 and a standard deviation 0.46, the factor was perceived as more than ‘important’.

4.2.4.5 Easy access to get destination map/leaflets

Except for the ‘very unimportant’ response alternative, almost all choices were selected by respondents: 1 (0.6 %) individual said the factor is ‘unimportant’, also another (1 or 0.6%) person stayed neutral, but 16 people (9.4%) said the attribute is important while the rest 152 (89.4%), the majority, confirmed that the factor is very important (see the mode in Appendix B and Table 4.7) for the competitiveness of the zone as a tourism destination. The mean (4.88) and the standard deviation (0.4) altogether ascertain that a high degree of importance of the attribute was seen by the respondents.

4.2.4.6 Favorable policies to tourists

About the importance of this factor, 2 (1.2%) individuals were neutral, 13 (7.6%) people said it is important whereas the majority (155 or 91.2%) of the respondents said the attribute is very important as they selected the 5th response alternative (see the mode section of Appendix B and Table 4.7). This was strengthened by the fact that the mean value of the scores (4.9) and the standard deviation (0.34) which all show that with a small difference the respondents saw a great importance of the attribute for the competitiveness of the zone as a tourism destination.

4.2.4.7 Cultural heritage preservation

The result on the importance of this factor (see Appendix B and Table 4.7) shows that most (163 or 95.9%) respondents selected the 5th response alternative (see the mode) which suggests that the factor is very important. The next response alternative chosen by (6 or 3.5%) respondents is response alternative ‘4’ (‘important’). The average (mean) response alternative selected was 4.95 with a small standard deviation of 0.24 which altogether, shows the importance this factor holds in the views of all respondents is clearly above ‘important’ and very close to ‘very important’.

4.2.4.8 Conservation of local tradition

As with (almost) all attributes discussed earlier, this factor also holds a great importance in the minds of respondents. Most individuals (161 or 94.7%) selected the 5th ('very important') response alternative (see the mode in Appendix B and Table 4.7). With a small variation (standard deviation of 0.26) from the mean (4.94), this attribute happens to have a great effect on the competitiveness of the zone as a tourism destination in the views of the respondents and therefore, is very important.

4.2.4.9 Environmental conservation

This attribute was viewed by the respondents as 'very important'; as most of them selected response alternative '5' (see the mode section of Appendix B and Table 4.7). Although other response alternatives such as 'unimportant', 'neutral' and 'important' were chosen by 1 (0.6%), 1 (0.6%) and 7 (4.1%) respondents respectively, most (161 or 94.7%) of them saw a very high importance of the attribute for the competitiveness of North Gondar zone as a tourism destination in the international market. The mean (4.93), median (5) and standard deviation (0.34) all suggest a strong feeling of respondents towards a high importance of the factor.

4.2.4.10 Efficiencies of tourism and hospitality staff

Table 4.7 shows, of the given five response alternatives, respondents chose only three: 'Very important', 'important' and 'unimportant'. The majority, who said 'Very important', accounted for 161 (94.7%); those who chose 'important' were 8 (4.7%) and the one who selected the 2nd response alternative (the one who said 'unimportant') was 1 (0.6%) in number. In other words, the most selected response alternative was '5' ('Very important') (see the mode section of Appendix B and Table 4.7). The mean is '4.94' and the standard deviation is 0.31 which is very small and showing a strong agreement between the respondents on their views of the importance of the attribute.

4.2.4.11 Use of IT in destination

The importance of the use of IT in destination as a factor of destination competitiveness was viewed as a huge one as most (154 or 90.6% of the) participants out of the 170 respondents

selected the 5th response alternative which is ‘very important’ (see Appendix B and Table 4.7). This, combined with the fact that the mean being 4.89 and standard deviation being 0.36, shows that a high importance is attached to the attribute by the respondents.

In conclusion (as shown in Table 4.3), the grand mean value of the category (Destination management) is 4.91 which means that the respondents saw a high importance of all the eleven attributes combined, and the standard deviation (0.05) which is very small also suggests that there is a minor difference among the respondents’ view on the importance of the category. The mean value of individual attributes under this category ranged from the least 4.78 (Multilingual signage) to the highest 4.96 (Safety and security).

4.2.5 DESTINATION IMAGE

Under this category, there are four attributes (as shown in Appendix B and Table 4.8) namely, Overall price in destination, Ensured safety and security, Crowd of tourists and finally, Friendliness of local people. Views of participants on the importance of these attributes is presented and discussed below:

4.2.5.1 Overall price in destination

As shown in Appendix B and Table 4.8, most respondents (145 of 85.3%) chose the 5th response alternative (‘very important’), 21 (12.4% of the) respondents selected the 4th (‘important’) response alternative and finally, a small number (4 or 2.4%) of participants chose the 2nd (‘neutral’) response alternative. The mean is 4.83 and the standard deviation is 0.44, all leading to the conclusion that the respondents saw this particular attribute as a very important one.

4.2.5.2 Ensured safety and security

From the given 5 response alternatives, most respondents (163 or 95.9%) chose ‘very important’ (see Appendix B and Table 4.8) while only 7 (4.1%) of them selected the ‘important’ response alternative. The mean (4.96) with a standard deviation of 0.2 also shows that the respondents (with little difference) saw a high degree of importance in the factor for the competitiveness of the zone.

Table 4.8 Results on the respondents' view of the importance of factors of destination competitiveness – DESTINATION IMAGE N=170

No	Factors/Attributes	Importance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Overall price in destination					4	2.4	21	12.4	145	85.3	4.83	5.00	5.00	.44
2	Ensured safety and security							7	4.1	163	95.9	4.96	5.00	5.00	.20
3	Crowd of tourists			4	2.4	12	7.1	24	14.1	130	76.5	4.65	5.00	5.00	.72
4	Friendliness of local people					2	1.2	8	4.7	160	94.1	4.93	5.00	5.00	.30

Note:

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1*= Very unimportant, 2*= Unimportant, 3*= Neutral, 4*= Important, 5*= Very important
- Sd*=Standard deviation

Source: researcher's own survey

4.2.5.3 Crowd of tourists

Here, the only response alternative left unselected was the 1st one ('very unimportant') while the rest 4 were chosen by the respondents. As Appendix B and Table 4.8 show, most participants (130 or 76.5%) chose the 5th or 'very important' response alternative. The average response alternative selected (as shown in the mean section of Appendix B and Table 4.8) was 4.65 and the standard deviation is 0.72 which all suggest a high importance of the attribute was seen by the respondents. So, whether a destination is crowded with tourists or not has a great effect on the image of the destination, as viewed by the respondents.

4.2.5.4 Friendliness of local people

When asked about the importance of friendliness of local people as a factor for the competitiveness of North Gondar as a tourism destination, most respondents (160 or 94.1%) said it is 'very important' (see also the mode section of Appendix B and Table 4.8). With a mean of 4.93 and a standard deviation of 0.3, the result shows a very high importance of the attribute for the competitiveness of the zone as an international tourism destination.

In conclusion (as shown in Table 4.3), the grand mean value of the category (Destination image) is 4.84 which means that the respondents saw a high importance of all the four attributes combined, and the standard deviation (0.14) which is very small also suggests that there is a minor difference among the respondents' view on the importance of the category. The mean value of individual attributes under this category ranged from the least 4.65 (Crowd of tourists) to the highest 4.96 (Ensured safety and security).

4.3 PERFORMANCE OF DESTINATION

This section of the study shows the views of respondents on the performance of North Gondar as an international tourism destination when measured in 36 destination competitiveness attributes which are grouped into five categories. For each attribute (factor), respondents were presented with five response alternatives to choose from: 1= **Very low**, 2= **Low**, 3= **Normal**, 4= **High**, 5= **Very high**. It is also important to note that in all the following text under this topic, the mean values are interpreted in the following manner: if the mean value of a particular attribute or category is in the range between:

- 1.00 and 1.49, then it means that the attribute is perceived by the respondents as 'Very low'
- 1.50 and 2.49, then it means that the attribute is perceived by the respondents as 'Low'
- 2.50 and 3.49, then it means that respondents are 'Normal'
- 3.50 and 4.49, then it means that the attribute is perceived by the respondents as 'High'
- 4.50 and 5.00 then it means that the attribute is perceived by the respondents as 'Very high'.

Results on how many respondents (what percentage of the respondents) chose which of the above response alternatives for a given factor is summarized in Appendix C and discussed under five headings. Also, the values of the grand means and standard deviations for each category are shown below (Table 4.9) and then discussed at the end each category.

Table 4.9 Category means and standard deviations

Performance			
No	Attributes category	Mean	Standard deviation
1	Destination Attractions	4.52	0.33
2	Tourism Superstructure	2.08	0.07
3	General Infrastructure	2.26	0.37
4	Destination Management	2.10	0.42
5	Destination Image	3.36	0.98

Source: researcher's own survey

4.3.1 DESTINATION ATTRACTIONS

Under this category, there are seven attributes (as shown in Appendix C and Table 4.10) namely, Comfortable climate for tourism, Natural landscape, Wonderful scenery, Cultural and historical attractions, Artistic and architectural design, Traditional art and crafts and Exotic and unique local custom. Views of participants on the performance of North Gondar as an international destination when measured in these attributes is presented and discussed below:

4.3.1.1 Comfortable climate for tourism

The respondents' view to the performance of North Gondar, when measured as an international tourism destination in this particular attribute, is summarized in Appendix C and Table 4.10 as: out of the entire 170 respondents, only 3 (1.8%) people said 'low', 14 (8.2%) respondents said 'normal', 45 (26.5%) individuals said 'high', the majority (108 or 63.5%) of them, however, said 'very high'. The mean value of the scores is 4.52 and the standard deviation is 0.72 showing a small degree of variation among respondents' views on the high performance of the zone as a tourism destination in the international market.

4.3.1.2 Natural landscape

For this attribute, of the given five response alternatives, the participants selected the last three (see Appendix C and Table 4.10): 'normal' (3 or 1.8% of them), 'high' (15 or 8.8% of them) and 'very high' (152 or 89.4% of them). These views of respondents is further strengthened when information on the values of the mean, median, mode and standard deviation is referred to,

which are 4.88, 5, 5 and 0.38 respectively. This leaves us with the conclusion that the performance of the zone in this particular attribute is very high.

4.3.1.3 Wonderful scenery

When seen in the eyes of the respondents, the performance of the zone in this particular attribute is ‘very high’ as that is the response alternative they chose most (see the mode section of Appendix C and Table 4.10): a great deal (153 or 90%) of respondents chose the ‘very high’ response alternative. The mean value of the scores is 4.85 which is high and means that the destinations’ performance is very high, and the standard deviation is small (0.47) which shows the views of the respondents is not far from each other.

Table 4.10 Results on the respondents’ view of the performance of destination (North Gondar’s competitiveness) when measured in competitiveness attributes – DESTINATION ATTRACTIONS N=170

No	Factors/Attributes	Performance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Comfortable climate for tourism			3	1.8	14	8.2	45	26.5	108	63.5	4.52	5.00	5.00	.72
2	Natural landscape					3	1.8	15	8.8	152	89.4	4.88	5.00	5.00	.38
3	Wonderful scenery					8	4.7	9	5.3	153	90.0	4.85	5.00	5.00	.47
4	Cultural and historical attractions			3	1.8	6	3.5	41	24.1	120	70.6	4.64	5.00	5.00	.64
5	Artistic and architectural design	1	.6	5	2.9	15	8.8	46	27.1	103	60.6	4.44	5.00	5.00	.82
6	Traditional art and crafts	1	.6	11	6.5	39	22.9	71	41.8	48	28.2	3.91	4.00	4.00	.91
7	Exotic and unique local custom	1	.6	6	3.5	12	7.1	55	32.4	96	56.5	4.41	5.00	5.00	.82

Note:

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1*= Very low, 2*= Low, 3*= Normal, 4*= High, 5*= Very high
- Sd*=Standard deviation

Source: researcher’s own survey

4.3.1.4 Cultural and historical attractions

When we see the response alternatives most selected by the respondents (Appendix C and Table 4.10), ‘very high’ comes first as the majority (120 or 70.6%) of the people selected it (see the mode). Another most selected response alternative is ‘high’ and was selected by 41 (24.1%) individuals. This, with a mean of 4.64 and a standard deviation of 0.64, tells that in the respondents’ view the performance of North Gondar in this attribute as an international destination is ‘very high’.

4.3.1.5 Artistic and architectural design

Though (as can be seen in Appendix C and Table 4.10) with a varying degree of weight, respondents chose all response alternatives, the most selected response alternative was the 5th one (‘very high’) as 103 (60.6% of the) individuals chose it. The second largest number people was of those who chose the 4th (‘high’) response alternative (46 or 27.1%). A mean (4.44) with a standard deviation of 0.82 also suggests that, with a minor difference, a high performance of the destination in the attribute was seen by the respondents.

4.3.1.6 Traditional art and crafts

The performance of the destination in this particular factor, when measured from the views of the respondents, is ‘high’, for it is the fourth response alternative which they chose most (see the mode section of this factor in Appendix C and Table 4.10). In other words, the majority (71 or 41.8 %) of individuals chose the ‘high’ response alternative. The mean is 3.91 and the standard deviation is 0.91 which shows the strong agreement on the views of a high performance of the destination. This is strengthened when we also see that the second largest number of people (48 or 28.2%) chose the ‘very high’ response alternative.

4.3.1.7 Exotic and unique local custom

The view on the performance of North Gondar as a tourism destination when measured in this factor (Exotic and unique local custom) has divided the respondents into five groups: two large (those who chose the ‘very high’ response alternative (96 or 56.5%) and those who chose the ‘high’ response alternative (55 or 32.4%)) and three smaller (those who selected the ‘normal’ response alternative (12 or 7.1%), those who said ‘low’ (6 or 3.5%) and those who chose the ‘very low’ response alternative (1 or 0.6%)). The mean is 4.41 and the standard deviation is 0.82

which all reflect the fact that respondents view on the performance of the zone in this attribute is high.

In conclusion (as shown in Table 4.9), the grand mean value of the category (Destination attractions) is 4.52 which means that the respondents saw a high performance in all the seven attributes combined, and the standard deviation (0.33) which is very small also suggests that there is a minor difference among the respondents' view on the destination's high performance in the category. The mean value of individual attributes under this category ranged from the least 3.91 (Traditional art and crafts) to the highest 4.88 (Natural landscape).

4.3.2 TOURISM SUPERSTRUCTURE

Under this category, there are eight attributes (as shown in Appendix C and Table 4.11) namely, Variety of accommodation, Quality service in accommodation, Variety of food and beverage services, Quality services in food and beverage services, Variety of evening entertainment, Tourism activities, Variety of shopping items and Presence of service providers. Views of participants on the performance of North Gondar as an international destination when measured in these attributes is presented and discussed below:

4.3.2.1 Variety of accommodation

Unlike the performance of the destination in previously discussed attributes, the respondents saw a low performance in this particular factor. As can be seen in Appendix C and Table 4.11, most respondents chose the 'low' response alternative. The same thing is suggested by the mean and standard deviation figures: 2.1 and 0.62 respectively. In conclusion, we can say that with a small difference in their views most respondents (134 or 78.8%) saw low performance of the destination in this attribute.

4.3.2.2 Quality service in accommodation

Like the views of the respondents on the performance of the destination in the previously discussed attribute, the destination is viewed as not performing well in this one, too. In other words, most respondents (135 or 79.4%) said the destination's performance in this factor is low. As also presented in Appendix C and Table 4.11, this view is supported by the fact that the second largest number of participants (18 or 10.6%) chose the 'very low' response alternative.

The mean (2.02), median (2), mode (2) and standard deviation (0.55) all give further information on the views of the respondents (with a small variation) rating the performance of the destination in the factor as low.

4.3.2.3 Variety of food and beverage services

The responses of the respondents on this factor range from ‘very low’ to ‘high’ (see Appendix C and Table 4.11). But as the mode (2) suggests, the most selected response alternative was the one which said ‘low’ as most people (121 or 71.2%) chose it. Those who chose the ‘very low’ response alternative (26 people or 15.3% of the total respondents) also reinforce the view of low performance of the destination. Other figures to strengthen this view include the mean (2.02), median (2), mode (2) and standard deviation (0.63). The mean suggests that the ‘low’ response alternative was what the respondents chose while the standard deviation tells that there was little difference among respondents view.

4.3.2.4 Quality services in food and beverage services

The range of views of the respondents on the performance of the destination in this particular attribute included all the 5 response alternatives as shown in Appendix C and Table 4.11: from ‘very low’ to ‘very high’. However, those who said ‘low’ were the majority of the respondents (125 or 73.5%). The next response alternative chosen by a large number of respondents was ‘very low’ (27 or 15.9%). The mean (1.97), median (2), mode (2) and standard deviation (0.59) all mirror the fact that with a small difference between the respondents’ view, the performance of the destination as an international tourism destination in this attribute is low.

4.3.2.5 Variety of evening entertainment

As the last few discussions on the performance of the zone in some destination competitiveness attributes suggested, North Gondar scored low performance in this one, too (see Appendix C and Table 4.11) as most (112 or 65.9%) respondents said it performed low. The only difference here is that the second largest group of people 26 (15.3%) chose the ‘normal’ response alternative, yet another group of almost the same size (23 or 13.5%) chose the ‘very low’ response alternative. The mean (2.14), median (2), mode (2) and standard deviation (0.76) all reveal the fact that with a small difference, the respondents viewed a low performance of the destination in this attribute.

Table 4.11 Results on the respondents’ view of the performance of destination (North Gondar’s competitiveness) when measured in competitiveness attributes – TOURISM SUPERSTRUCTURE N=170

No	Factors/Attributes	Performance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Variety of accommodation	14	8.2	134	78.8	15	8.8	5	2.9	2	1.2	2.10	2.00	2.00	.62
2	Quality service in accommodation	18	10.6	135	79.4	13	7.6	3	1.8	1	.6	2.02	2.00	2.00	.55
3	Variety of food and beverage services	26	15.3	121	71.2	17	10.0	6	3.5			2.02	2.00	2.00	.63
4	Quality services in food and beverage services	27	15.9	125	73.5	15	8.8	2	1.2	1	.6	1.97	2.00	2.00	.59
5	Variety of evening entertainment	23	13.5	112	65.9	26	15.3	6	3.5	3	1.8	2.14	2.00	2.00	.76
6	Tourism activities	16	9.4	130	76.5	16	9.4	5	2.9	3	1.8	2.11	2.00	2.00	.67
7	Variety of shopping items	19	11.2	128	75.3	16	9.4	3	1.8	4	2.4	2.09	2.00	2.00	.70
8	Presence of service providers	14	8.2	120	70.6	29	17.1	4	2.4	3	1.8	2.19	2.00	2.00	.69

Note:

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1*= Very low, 2*= Low, 3*= Normal, 4*= High, 5*= Very high
- Sd*=Standard deviation

Source: researcher’s own survey

4.3.2.6 Tourism activities

An equal number of people (16 or 9.4%) chose either the ‘normal’ or the ‘very low’ response alternative in viewing the performance of the destination in the international market (see Appendix C and Table 4.11). However, the majority of the respondents (130 or 76.5%) selected the ‘low’ response alternative. This, together with the figures shown in the mean (2.11), median (2), mode (2) and standard deviation (0.67) leaves us with the reality that, from the respondents’ point of view (with little difference in their views), the zone’s performance in this attribute as a tourism destination is low.

4.3.2.7 Variety of shopping items

As with the other few attributes discussed previously, the destination is viewed as performing low in this attribute, too (refer to Appendix C and Table 4.11) since from the given response alternatives, most (128 or 75.3%) respondents selected the ‘low’ response alternative. Besides other (19 or 11.2%) respondents also chose the ‘very low’ response alternative. Furthermore, the mean, median, mode and standard deviation (2.09, 2, 2 and 0.7 respectively) reflect the view (with minor difference) that the destination’s performance in this attribute is low.

4.3.2.8 Presence of service providers

Once again, the performance of North Gondar zone as an international tourism destination in this factor was seen as ‘low’ since, from the given 5 response alternatives, that is what most respondents (120 or 70.6%) chose. Other groups of people who chose the ‘very low’ response alternative constitute 8.2% (14) of the total respondents while the other 29 (17.1%) individuals said ‘normal’. Only 7 people altogether selected either the ‘high’ or the ‘very high’ response alternative (4 or 2.4% and 3 or 1.8% respectively). The mean value of the scores is 2.19 and the standard deviation is 0.69 which both imply that (with a small difference in respondents’ views) the performance of the destination in the factor being discussed was seen as low.

In conclusion (as shown in Table 4.9), the grand mean value of the category (Tourism superstructure) is 2.08 which means that the respondents saw a low performance in all the eight attributes combined, and the standard deviation (0.07) which is very small also suggests that there is a minor difference among the respondents’ view on the destination’s low performance in the category. The mean value of individual attributes under this category ranged from the lowest 1.97 (Quality services in food and beverage services) to the highest 2.19 (Presence of service providers).

4.3.3 GENERAL INFRASTRUCTURE

Under this category, there are six attributes (as shown in Appendix C and Table 4.12) namely, Various modes of transport, Smooth transportation within destination, Banking and financial services, Telecommunication services, Electric supply and Infrastructure to meet visitors needs.

Views of participants on the performance of North Gondar as an international destination when measured in these attributes is presented and discussed below:

4.3.3.1 Various modes of transport

As shown in Appendix C and Table 4.12, the destination is said to have low performance in this particular attribute since the majority of the respondents (115 or 67.6%) have chosen the ‘low’ response alternative. Another 25 (14.7%) respondents also said the destination has a ‘very low’ performance in this attribute. The mean (2.09), median (2), mode (2) and standard deviation (0.74) also prove the same thing in that with a small variation in their views, the respondents said the destination performed ‘low’ in this attribute.

Table 4.12 Results on the respondents’ view of the performance of destination (North Gondar’s competitiveness) when measured in competitiveness attributes – GENERAL INFRASTRUCTURE N=170

No	Factors/Attributes	Performance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Various modes of transport	25	14.7	115	67.6	22	12.9	5	2.9	3	1.8	2.09	2.00	2.00	.74
2	Smooth transportation within destination	24	14.1	109	64.1	31	18.2	3	1.8	3	1.8	2.13	2.00	2.00	.73
3	Banking and financial services	7	4.1	27	15.9	115	67.6	13	7.6	8	4.7	2.93	3.00	3.00	.77
4	Telecommunication services	12	7.1	78	45.9	75	44.1	2	1.2	3	1.8	2.45	2.00	2.00	.72
5	Electric supply	21	12.4	128	75.3	18	10.6	1	.6	2	1.2	2.03	2.00	2.00	.60
6	Infrastructure to meet visitors needs	35	20.6	120	70.6	10	5.9	3	1.8	2	1.2	1.92	2.00	2.00	.66

Note:

- 1* = Very low, 2* = Low, 3* = Normal, 4* = High, 5* = Very high
- Sd* = Standard deviation

Source: researcher’s own survey

4.3.3.2 Smooth transportation within destination

As depicted in Appendix C and Table 4.12, a large number (64.1%) of the participants (109 respondents) selected the 'low' response alternative while other 31 (18.2%) and 24 (14.1%) chose the 'normal' and 'very low' response alternatives. Also by looking at the values of the mean (2.13), median (2), mode (2) and the standard deviation (0.73), we can conclude that the zone's performance as a tourism destination in this factor was viewed by the respondents (with little difference) as 'low'.

4.3.3.3 Banking and financial services

Unlike all the other views of respondents on the performance of the zone as a tourism destination in the previously discussed attributes, North Gondar's performance in this factor is said to be normal. Most (115 or 67.6%) individuals have chosen the 'normal' response alternative while other 27 people (15.9%) selected the 'low' response alternative (see Appendix C and Table 4.12). With a mean value of 2.93 and a standard deviation of 0.77, it can be generalized that (with a small variation of views) the zone's performance as a tourism destination in this particular attribute was rated by the respondents as 'normal'.

4.3.3.4 Telecommunication services

As shown in Appendix C and Table 4.12, about 90% of the respondents were divided into two almost equal groups of people (the majority or those who said the zone's performance in this attribute is 'low' (78 or 45.9%) and those who said the destination's performance is 'normal' (75 or 44.1%)). But from what the mean (2.45) and the standard deviation (0.72) suggest, we can say the performance was rated by the respondents (with a small difference of views) as more of 'low' than 'normal'.

4.3.3.5 Electric supply

The performance of the destination related to electric supply is perceived by the respondents as 'low'. As shown in Appendix C and Table 4.12, the majority (128 or 75.3%) of respondents chose the 'low' response alternative while another (second big) group (21 people or 12.4%) selected the 'very low' response alternative. When generalized with the help of information from the values of the mean (2.03) and standard deviation (0.60), the performance of the zone as a

tourism destination in this attribute was viewed (with a minor difference in their views) by the participants as 'low'.

4.3.3.6 Infrastructure to meet visitors needs

Only 15 people altogether said the zone's performance in this attribute is either 'high' (3 or 1.8%), 'very high' (2 or 1.2%) or 'normal' (10 or 5.9%). The vast majority of the respondents said the zone performed 'low' (120 or 70.6%) while another group of respondents (35 or 20.6%) selected the 'very low' response alternative. This is further supported by the values of the mean (1.92) and standard deviation (0.66). Then it is possible to conclude that the performance of the zone as an international tourism destination in this attribute was rated by the respondents (with a small variation in their views) as 'low'.

In conclusion (as shown in Table 4.9), the grand mean value of the category (General superstructure) is 2.26 which means that the respondents saw a low performance in all the six attributes combined, and the standard deviation (0.37) which is very small also suggests that there is a minor difference among the respondents' view on the destination's low performance in the category. The mean value of individual attributes under this category ranged from the least 1.92 (Infrastructure to meet visitors needs) to the highest 2.93 (Banking and financial services).

4.3.4 DESTINATION MANAGEMENT

Under this category, there are eleven attributes (as shown in Appendix C and Table 4.13) namely, Cleanliness in destination, Safety and security, Public bathrooms and restrooms, Multilingual signage, Easy access to get destination map/leaflets, Favorable policies to tourists, Cultural heritage preservation, Conservation of local tradition, Environmental conservation, Efficiencies of tourism and hospitality staff and Use of IT in destination. Views of participants on the performance of North Gondar as an international destination when measured in these attributes is presented and discussed below:

4.3.4.1 Cleanliness in destination

When measured in this attribute, the destination is said to have performed 'low' (Appendix C and Table 4.13). The majority (113 or 66.5%) individuals said it performed 'low' whereas 37 (21.8%) respondents said North Gondar performed 'very low'. This is further reflected in the

mean, media, mode and standard deviation values which are 1.94, 2, 2 and 0.68 respectively that with a small difference on their views, the respondents rated the performance of the zone as 'low'.

4.3.4.2 Safety and security

Put together, a total of 138 respondents (81.2% of the total participants) have judged the performance of North Gondar as either 'normal' (84 or 49.4%) or 'high' (54 or 31.8%). But when we see the mean (3.29) and the standard deviation (0.84), we can generalize that the zone's performance in this attribute was rated by the respondents (with a minor difference in their judgments) as 'normal'.

4.3.4.3 Public bathrooms and restrooms

Seen from the view points of the respondents, the performance of North Gondar as a tourism destination in this particular attribute lies between 'low' (103 or 60.6%) and 'very low' (54 or 31.8%). However, as the vast majority of the respondents selected the 'low' response alternative, and as also suggested by the values of the mean (1.78) and standard deviation (0.65), the participants (with a minor variation of views) rated the zone's performance as 'low'.

4.3.4.4 Multilingual signage

As depicted in Appendix C and Table 4.13, the respondents viewed the performance of the destination as 'low' (the majority of the respondents (110 or 64.7%)) and 'very low' (51 participants or 30%). Also when seen from what the mean (1.75) and the standard deviation (0.54) suggest, it is clear that the zone's performance in this factor of destination competitiveness was viewed (with a minor difference in views) as 'low'.

4.3.4.5 Easy access to get destination map/leaflets

When it comes to the performance of the zone as an international destination in providing tourists an easy access to get destination map or leaflets, it scores 'low' (as most respondents (133 or 78.2%) of the total 170 participants judged it) or even 'very low' (as 21 respondents or 12.4% of the total participants viewed it). Also the mean (1.98), mode (2) and the standard

deviation (0.52) all affirm that the ‘low’ option was what most people selected with a small difference in views (see the mode section of the Appendix C and Table 4.13).

Table 4.13 Results on the respondents’ view of the performance of destination (North Gondar’s competitiveness) when measured in competitiveness attributes – DESTINATION MANAGEMENT N=170

No	Factors/Attributes	Performance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Cleanliness in destination	37	21.8	113	66.5	16	9.4	2	1.2	2	1.2	1.94	2.00	2.00	.68
2	Safety and security	5	2.9	16	9.4	84	49.4	54	31.8	11	6.5	3.29	3.00	3.00	.84
3	Public bathrooms and restrooms	54	31.8	103	60.6	9	5.3	4	2.4			1.78	2.00	2.00	.65
4	Multilingual signage	51	30.0	110	64.7	9	5.3					1.75	2.00	2.00	.54
5	Easy access to get destination map/leaflets	21	12.4	133	78.2	15	8.8			1	.6	1.98	2.00	2.00	.52
6	Favorable policies to tourists	20	11.8	92	54.1	49	28.8	6	3.5	3	1.8	2.29	2.00	2.00	.79
7	Cultural heritage preservation	19	11.2	125	73.5	20	11.8	5	2.9	1	.6	2.08	2.00	2.00	.63
8	Conservation of local tradition	36	21.2	105	61.8	24	14.1	4	2.4	1	.6	1.99	2.00	2.00	.71
9	Environmental conservation	20	11.8	125	73.5	23	13.5	1	.6	1	.6	2.05	2.00	2.00	.57
10	Efficiencies of tourism and hospitality staff	11	6.5	137	80.6	21	12.4	1	.6			2.07	2.00	2.00	.46
11	Use of IT in destination	32	18.8	126	74.1	11	6.5	1	.6			1.89	2.00	2.00	.52

Note:

- All the areas shaded in gray show all the response alternatives not chosen by respondents.
- 1*= Very low, 2*= Low, 3*= Normal, 4*= High, 5*= Very high
- Sd*=Standard deviation

Source: researcher’s own survey

4.3.4.6 Favorable policies to tourists

About the performance of the zone in this attribute, most people selected the first three response alternatives: ‘very low’ (20 or 11.8%), ‘low’ (92 or 54.1%) and ‘normal’ (49 or 28.8%). But, since the majority of the respondents said the zone performed ‘low’ and also from what the mean (2.29) and the standard deviation (0.79) suggest, we can see that the destination’s performance (with a small difference of judgment) was rated by the respondents as ‘low’.

4.3.4.7 Cultural heritage preservation

The destination, when seen from the point of view of the respondents on how it performed in preserving its cultural heritages, it scored ‘low’. The ‘low’ response alternative was selected by a great number (125 or 73.5%) of respondents. That is also what is reflected in the mean (2.08) and the standard deviation (0.63) values: the participants (with a minor variation in their views) rated the performance of the zone as ‘low’.

4.3.4.8 Conservation of local tradition

The score of the performance of the destination in this factor ranges from ‘very low’ (36 or 21.2%) to ‘very high’ (1 or 0.6%). But as it is clearly shown in Appendix C and Table 4.13, most people (105 or 61.8%) chose the ‘low’ response alternative. The same view is also suggested in the values of the mean (1.99) and standard deviation (0.71) that with a small difference among the respondents’ view, North Gondars’ performance was rated as ‘low’.

4.3.4.9 Environmental conservation

In this attribute, the respondents saw the performance of the zone as ‘low’ since a great deal (125 or 73.5%) of participants has chosen this (‘low’) response alternative. We also arrive on the same conclusion when we see it from the point of view of the mean (2.05) and standard deviation (0.57) values: with a slight variation in views, the respondents rated the zone’s performance as ‘low’.

4.3.4.10 Efficiencies of tourism and hospitality staff

A lion share (80.6%) of the respondents (137 individuals) has judged the performance of North Gondar as ‘low’ when it is measured with the efficiency of staffs in the tourism industry. The average (mean) value of the scores is 2.07 which also shows ‘low’ performance, and this (the

‘low’ response alternative) was chosen with a small variation (standard deviation=0.46) among the views of respondents.

4.3.4.11 Use of IT in destination

When it comes to the use of IT in the destination, North Gondar is said to have performed ‘low’. The majority (126 or 74.1%) of the respondents have evaluated it as having low performance in the attribute. The mean (1.89) and standard deviation (0.52) also reveal the same idea that with a minor difference in views, the performance of the zone was rated by the respondents as ‘low’.

In conclusion (as shown in Table 4.9), the grand mean value of the category (Destination management) is 2.10 which means that the respondents saw a low performance in all the eleven attributes combined, and the standard deviation (0.42) which is very small also suggests that there is a minor difference among the respondents’ view on the destination’s low performance in the category. The mean value of individual attributes under this category ranged from the least 1.75 (Multilingual signage) to the highest 3.29 (Safety and security).

4.3.5 DESTINATION IMAGE

Under this category, there are four attributes (as shown in Appendix C and Table 4.14) namely, Overall price in destination, Ensured safety and security, Crowd of tourists and finally, Friendliness of local people. Views of participants on the performance of North Gondar as an international destination when measured in these attributes is presented and discussed below:

4.3.5.1 Overall price in destination

North Gondar as an international tourism destination has, as the mean (2.72) suggests, a ‘normal’ performance. But when we see how many people selected which response alternative, the majority of the respondents (87 or 51.2%) selected the ‘low’ response alternative, 37 (21.8%) selected the ‘normal’ response alternative, 36 (21.2%) selected the ‘high’ response alternative, 6 (3.5%) selected the ‘very high’ response alternative and finally 4 (2.4%) selected the ‘very low’ response alternative. The standard deviation (0.94) also shows that the view that the destination’s performance was ‘low’, showed little variation.

4.3.5.2 Ensured safety and security

When the performance of the zone is brought to the issue of insured safety and security, the destination performed ‘low’ in the eyes of respondents (as shown in Appendix C and Table 4.14). Most (108 or 63.5%) respondents supported this view. The mean (2.34) and standard deviation (0.75) also suggest the same result with a little difference in the views of respondents.

Table 4.14 Results on the respondents’ view of the performance of destination (North Gondar’s competitiveness) when measured in competitiveness attributes – DESTINATION IMAGE N=170

No	Factors/Attributes	Performance										Mean	Median	Mode	Sd*
		1*		2*		3*		4*		5*					
		freq	%	freq	%	freq	%	freq	%	freq	%				
1	Overall price in destination	4	2.4	87	51.2	37	21.8	36	21.2	6	3.5	2.72	2.00	2.00	.94
2	Ensured safety and security	10	5.9	108	63.5	41	24.1	7	4.1	4	2.4	2.34	2.00	2.00	.75
3	Crowd of tourists	4	2.4	3	1.8	11	6.5	116	68.2	36	21.2	4.04	4.00	4.00	.75
4	Friendliness of local people	1	.6	3	1.8	10	5.9	77	45.3	79	46.5	4.35	4.00	5.00	.72

Note:

- 1*= Very low, 2*= Low, 3*= Normal, 4*= High, 5*= Very high
- Sd*=Standard deviation

Source: researcher’s own survey

4.3.5.3 Crowd of tourists

It seems that crowdedness is not an issue as most respondents (116 or 68.2%) saw a ‘high’ performance of the zone. Other 36 (21.2%) people also saw a ‘very high’ performance. The mean (4.04), median (4), mode (4) and standard deviation (0.75) all reflect a ‘high’ performance, too with little variation in the views of the respondents.

4.3.5.4 Friendliness of local people

Though the mode (5) suggests it is the 5th response alternative (‘very high’) which most people (79 or 46.5%) selected; the mean (4.35), median (4) and standard deviation (0.72) all show that, on average, the respondents (with a little difference in their views) saw a ‘high’ performance of

the destination, not a 'very high' one. Of course those who said the zone performed 'high' accounted for 45.3% (77) of the total participants (see Appendix C and Table 4.14).

In conclusion (as shown in Table 4.9), the grand mean value of the category (Destination image) is 3.36 which means that the respondents saw a normal performance (neither low nor high) in all the four attributes combined, and the standard deviation (0.98) which is very small also suggests that there is a minor difference among the respondents' view on the destination's normal (neither low nor high) performance in the category. The mean value of individual attributes under this category ranged from the least 2.34 (Ensured safety and security) to the highest 4.35 (Friendliness of local people).

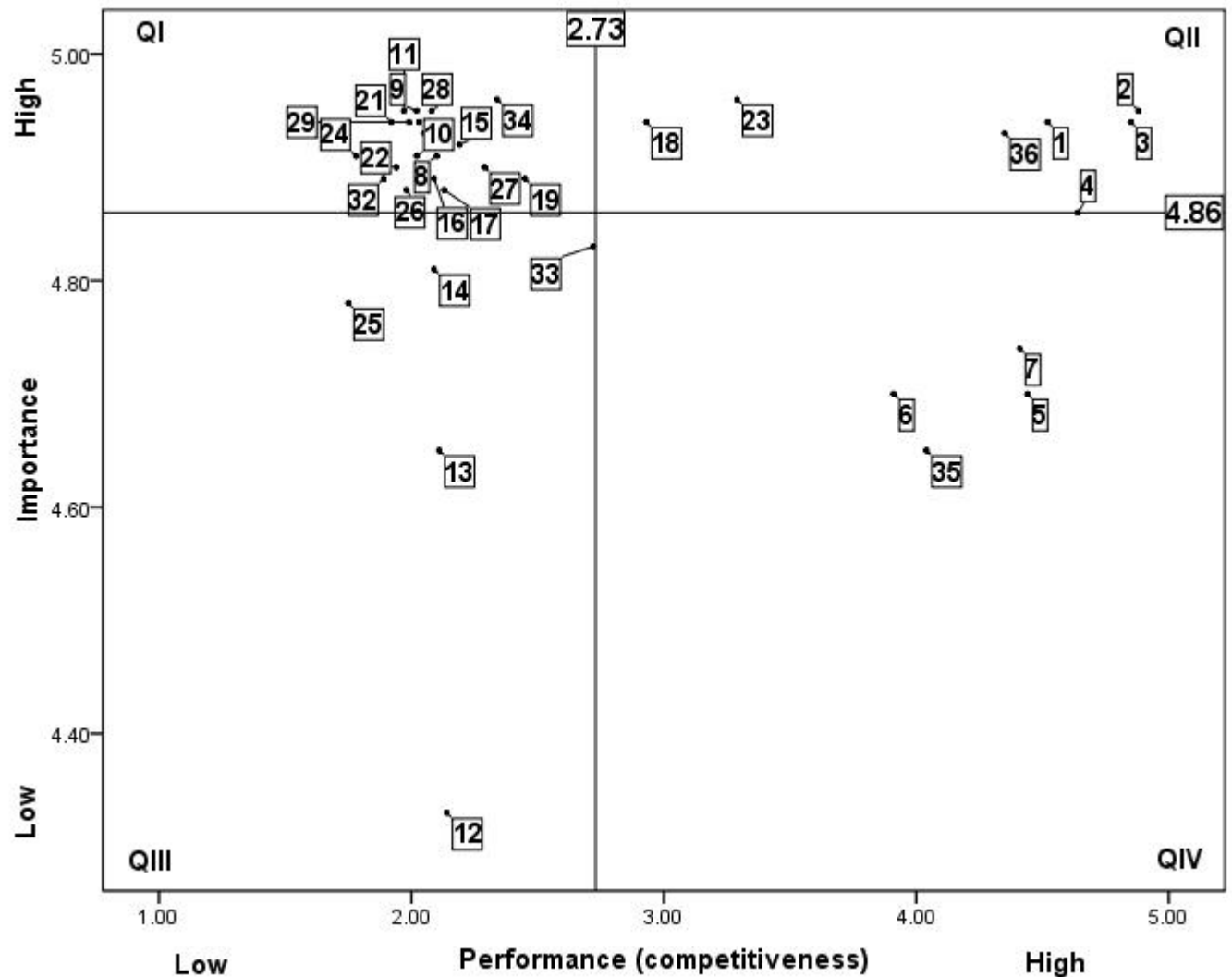
4.4 IMPORTANCE- PERFORMANCE ANALYSIS (IPA)

As explained earlier in the methodology section of this study and shown in Figure 4.1, this analysis puts all the different scores of importance of attributes and performance of the destination into four quadrants namely, Quadrant I (concentrate here), Quadrant II (keep up the good work), Quadrant III (low priority) and finally Quadrant IV (possible overkill).

The performance of the destination in the given attributes is shown on the 'X' axis and is divided into 'High' and 'Low' categories, whereas how important the attributes are for the competitiveness of the destination in the international tourism market is shown on the 'Y' axis and, again, is divided into 'High' and 'low' categories.

Those attribute which ended up in Quadrant I are those with high importance but low performance, those in Quadrant II are those with both high importance and high performance, those in Quadrant III are those with both low importance and low performance; and finally, those in Quadrant IV are those with low importance but high performance.

Figure 4.1 IPA model of North Gondar zone as an international tourism destination



Note that the importance-performance mean scores of attributes are shown in Appendix D

Legend

- | | |
|--------------------------------------|--|
| 1. Comfortable climate | 8. Variety of accommodation facilities |
| 2. Natural landscape | 9. Quality services in accommodation |
| 3. Wonderful scenery | 10. Variety of F&B services |
| 4. Cultural and historical | 11. Quality services in F&B |
| 5. Artistic and architectural design | 12. Variety of evening entertainments |
| 6. Traditional arts and crafts | 13. Tourism activities |
| 7. Exotic and unique local custom | 14. Variety of shopping items |

15. Presence of service providers	26. Easy access to get brochures/leaflets
16. Various modes of accessible	27. Favorable policies to tourists
17. Smooth transportation	28. Preservation of cultural heritage
18. Banking and financial services	29. Conservation of local tradition
19. Telecommunication services	30. Environmental conservation
20. Electricity supply	31. Efficiencies of tourism staff
21. Infrastructure to meet visitors needs	32. Use of IT in destination
22. Cleanliness in destination	33. Overall price in destination
23. Safety and security	34. Ensured safety and security
24. Public bathrooms	35. Crowd of tourists
25. Multilingual signage	36. Friendliness of local people

As shown in Figure 4.1, “concentrate here” of quadrant I (QI), those attributes which were considered by the respondents as having high importance for North Gondar to be competitive in the international tourism market but, at the same time with low performance included the 8th, 9th, 10th, 11th, 15th, 16th, 17th, 19th, 20th, 21st, 22nd, 24th, 26th, 27th, 28th, 29th, 30th, 31st, 32nd and 34th attributes. This quadrant is the most critical and decision makers are recommended to concentrate here. According to the result there is a need to put more effort on Variety of accommodation, Quality service in accommodation, Variety of food and beverage services, Quality services in food and beverage services, Presence of service providers, Various modes of transport, Smooth transportation within destination, Telecommunication services, Electric supply, Infrastructure to meet visitors needs, Cleanliness in destination, Public bathrooms and restrooms, Easy access to get destination map/leaflets, Favorable policies to tourists, Cultural heritage preservation, Conservation of local tradition, Environmental conservation, Efficiencies of tourism and hospitality staff, Use of IT in destination and Ensured safety and security.

The ‘keep up the good work’ quadrant (QII), as shown in Figure 4.1, included those attributes viewed by respondents as having both high importance and high performance. The 1st, 2nd, 3rd, 4th, 18th, 23rd and 36th attributes are all incorporated there. So, North Gondar is more competitive in Comfortable climate for tourism, Natural landscape, Wonderful scenery, Cultural and

historical attractions, Banking and financial services, Safety and security and Friendliness of local people.

Those attributes which were seen by respondents as having both low importance and low performance were the 12th, 13th, 14th, 25th and 33rd attributes and are all included in the 'lower priority' quadrant (QIII) as shown in Figure 4.1. North Gondar is relatively weak in Variety of evening entertainment, Tourism activities, Variety of shopping items, Overall price in destination and Multilingual signage, however, these are unimportant according to respondents and referred as low priority attributes.

And finally, those attributes which were seen by respondents as having low importance but high performance are those shown in the QIV (possible overkill section Figure 4.1). These included the 5th, 6th, 7th and 35th attributes. North Gondar could perform well on Artistic and architectural design, Crowd of tourists, Exotic and unique local custom, Traditional art and crafts, but it is thought to be less important. Any further efforts on these attributes may be waste of effort.

CHAPTER FIVE

CONCLUSION AND RECOMMENDATIONS

5.1 CONCLUSION

This study attempted to investigate the competitiveness of North Gondar zone as an international tourism destination from a supply-side perspective. In doing so, identifying important factors of destination competitiveness and measuring the performance of the zone was found to be the best way to accomplish the objectives of the study. As a result, 36 attributes grouped under five categories were identified from the literature study and a five point Likert scale survey was prepared and conducted on 170 participants from different tourism related stakeholder organizations. Respondents were asked to first identify the most important factors which, in their views, affect the competitiveness of North Gondar as a tourism destination in the international tourism market and also to measure the zone's current performance in those attributes.

Data from the survey was entered to a computer and analyzed with the help of a special computerized statistical package called SPSS 16.0. Results were tabulated and discussed using descriptive statistics such as frequency distributions and percentages, means, medians, modes and standard deviations. But again, to prioritize areas of attention and efforts, results from the survey were analyzed on importance-performance analysis (IPA) grid.

Based on the above grounds, it is found that all the 36 attributes, except for 'Variety of evening entertainment', were seen by the respondents '**very important**' – for the competitiveness of North Gondar in the international tourism market – having a mean value of 4.65 and above (ranging from 'Crowded of tourists' (4.65) to 'Safety and security' (4.96)). The values of the standard deviations for all 36 attributes ranged from the highest (0.72) to the lowest (0.2) which are all between zero and one (between 0 and 1) and are considered to show not much difference between respondents' views on the importance of the attributes for the competitiveness of the zone. But, even 'Variety of evening entertainment' was viewed as 'important' having a mean value of 4.33 –just to say that it was not seen as 'very important'.

However, as far as performance is concerned, the views of the respondents is different from that of importance of attributes not in all attributes was the zone considered to have performed well

as an international tourism destination. North Gondar was viewed by the respondents as having a 'high' performance in attributes such as 'Comfortable climate for tourism', 'Natural landscape', 'Wonderful scenery', 'Cultural and historical attractions', 'Artistic and architectural design', 'Traditional art and crafts' and 'Exotic and unique local custom' of 'Destination attractions category' which are all endowed natural and cultural attractions; and 'Crowd of tourists' and 'Friendliness of local people' of 'Destination image' category. In other words, the destination is competitive in all the seven attributes of 'Destination attractions' and only two (of the four) attributes of 'destination image' categories. This leaves us with the conclusion that from the 36 attributes the respondents viewed as having high importance for the competitiveness of the zone; North Gondar is competitive in only 9 of them.

The mean values for all the above 9 attributes ranged from the highest 4.88 of 'Natural landscape' to the lowest 3.91 of 'Traditional art and crafts'. The views of the respondents have very small variation as the values of the standard deviations for these attributes ranged from 0.38 (of 'Natural landscape') to 0.91 ('Traditional art and crafts') which is all between zero (0) and one (1).

Other attributes in which the zone was seen as having a 'normal' (neither 'low' nor 'high') performance included 'Safety and security' of 'Destination management' category (with a mean value of 3.29), 'Banking and financial services' of 'General infrastructure' category (with a mean value of 2.93) and 'Overall price in destination' of 'Destination image' category (with a mean value of 2.73). The standard deviation value for these 3 attributes ranged from 0.77 of 'Banking and financial services' to 0.94 of 'Overall price in destination' which is between small (between 0 and 1) and suggesting a small variation among the views of respondents.

In the rest 24 attributes of destination competitiveness, North Gondar was viewed by the respondents as having a weak performance including 'Variety of accommodation', 'Quality service in accommodation', 'Variety of food and beverage services', 'Quality services in food and beverage services', 'Variety of evening entertainment', 'Tourism activities', 'Variety of shopping items' and 'Presence of service providers' of 'Tourism superstructure' category; 'Various modes of transport', 'Smooth transportation within destination', 'Telecommunication services', 'Electric supply' and 'Infrastructure to meet visitors needs' of 'General infrastructure' category; 'Cleanliness in destination', 'Public bathrooms and restrooms', 'Multilingual signage',

‘Easy access to get destination map/leaflets’, ‘Favorable policies to tourists’, ‘Cultural heritage preservation’, ‘Conservation of local tradition’ ‘Environmental conservation’, ‘Efficiencies of tourism and hospitality staff’ and ‘Use of IT in destination’ of ‘Destination management’ category; and finally, ‘Ensured safety and security’ of ‘Destination image’ category. The mean values of all these attributes ranged from the smallest 1.75 of ‘Multilingual signage’ (in ‘Destination management’ category) to the highest 2.45 of ‘Telecommunication services’ (in ‘General infrastructure’ category) which are all in range of ‘low’ performance. The standard deviation values of all these 24 attributes ranged from the highest 0.74 of ‘Various modes of transport’ in the ‘General infrastructure’ category to the lowest 0.46 of ‘Efficiencies of tourism and hospitality staff’ in ‘Destination management’ category which all suggest that there was not much difference between the views of respondents as these values are between zero (0) and one (1).

But, when it comes to prioritizing attributes on the IPA grid, the picture is a bit different from what has previously been concluded. As this method puts the attributes into only a ‘high-low’ matrix from a total mean value of ‘importance’ and ‘performance’ of attributes and there are no other alternatives such as ‘very low’, ‘normal’ or ‘very high’, what was seen as having a ‘high’ importance might fall into a quadrant which suggests ‘low’ importance. However, as this analysis gives responsible bodies a quick picture of priorities all in an easily applicable format; it is helpful for efficient allocation of resources.

Therefore, those areas which need immediate attention and allocation of resources include: ‘Variety of accommodation’, ‘Quality service in accommodation’, ‘Variety of food and beverage services’, ‘Quality services in food and beverage services’ and ‘Presence of service providers’ of the ‘Tourism superstructure’ category; ‘Various modes of transport’, ‘Smooth transportation within destination’, ‘Telecommunication services’, ‘Electric supply’ and ‘Infrastructure to meet visitors needs’ of the ‘General infrastructure’ category; ‘Cleanliness in destination’, ‘Public bathrooms and restrooms’, ‘Easy access to get destination map/leaflets’, ‘Favorable policies to tourists’, ‘Cultural heritage preservation’, ‘Conservation of local tradition’, ‘Environmental conservation’, ‘Efficiencies of tourism and hospitality staff’ and ‘Use of IT in destination’ of the ‘Destination management’ category; and finally ‘Ensured safety and security’ of the ‘Destination image’ category.

North Gondar as a tourism destination is suggested to keep up the good work in areas such as ‘Comfortable climate for tourism’, ‘Natural landscape’, ‘Wonderful scenery’, ‘Cultural and historical attractions’ of the ‘Destination attractions’ category which are all either endowed naturally or inherited. Other areas also include ‘Banking and financial services’ from ‘general infrastructure’ category; ‘Safety and security’ from ‘Destination management’ category and lastly, ‘Friendliness of local people’ from ‘Destination image’ category.

The rest, about nine (9), attributes are not even worth mentioning as they fall into either ‘low importance’-‘low performance’ quadrant or ‘low importance’-‘high performance’ quadrant.

5.2 RECOMMENDATIONS

Based upon the results of this study, several recommendations can be made to increase the competitiveness of North Gondar zone in the international tourism market.

1. The study revealed that when all the 36 attributes were seen as important for the competitiveness of the zone’s tourism, it is only in 12 of them the destination scored either a ‘normal’ or a ‘high’ performance. In the rest 24 factors the zone exhibited poor performance. With this in mind, this study recommends that these areas should be focused on, planned ahead and resources should be allocated to.
2. As they are the primary elements of destination appeal, it is good that North Gondar is performing well in attributes under ‘destination attractions’, however, as these may not last forever if not handled properly, this study recommends that they need to be treated in a sustainable way so as to prolong them for future generations.
3. Another area the zone fall short of achieving is competitiveness of the ‘Tourism superstructure’. All necessary efforts should be directed towards assuring the variety and quality of ‘Tourism superstructure’ as it can represent in itself a significant percentage of the overall appeal of a destination.
4. The study result shows that North Gondar’s performance in most attributes of ‘general infrastructures’ is weak. But, as these attributes provide the foundation upon which a tourism destination can be built and can be a particularly critical factor, responsible bodies should see towards and act accordingly to improving the general infrastructure of the destination.

5. The study revealed that except for safety and security, performance of the zone in other attributes under 'Destination management' is poor. So this study recommends that the responsible bodies of destination management should work with the understanding that the success of tourism relies on a coordinated approach to the planning, development, management and marketing of the destination and that well managed tourism can be highly sustainable or the otherwise could happen
6. It has been found out that though in most of the attributes listed under the 'Destination image' the zone performed 'normal' or above, it scored low in 'insured safety and security'. This should be solved as immediately as possible since safety and security in its all forms is at the top priority of tourists. Moreover image should be seen as a factor that can take time to change even though the reality at a destination no longer accords with a negative image.
7. As seen in this study, different stakeholders constitute North Gondar's tourism industry which suggests that all stakeholders of the zone's tourism industry should work together towards a competitive tourism since a competitive tourism should not be (as it cannot be) perceived as a phenomenon left to the few but rather must be understood as a team work.
8. Generally, (as also suggested in the IPA model of this study), all the destination competitiveness attributes which were seen by the respondents as having 'high' importance but with which the destination is said to have performed poor (low), should be given due attention to enhance competitiveness.

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APPENDIX A

Population size classification

No.	Stakeholder segment	Location/ number			Targets				Sample/ number of representatives (60% of the total target)				
		Gondar	Debark	Total	Position	Gondar	Debark	Total	Gondar	Approximately (G)*	Debark	Approximately (D)**	Total sample (G+D)
1	Hotels and Pensions	28	8	36	General managers	28	8	36	16.8	17	4.8	5	22
2	Lodges	3	3	6	General managers	3	3	6	1.8	2	1.8	2	4
3	Restaurants	3	0	3	General managers	3	0	3	1.8	2	0	0	2
4	Local travel agents	11	0	11	General managers	11	0	11	6.6	7	0	0	7
5	Professional tour guides associations	1	1	2	Members	56	68	124	33.6	34	40.8	41	75
6	Government Tourism office	2	1	3	Tourism office heads	2	1	3	1.2	2	0.6	1	3
7	Tourism police associations	1		1	Members	15	0	15	9	9	0	0	9
8	(Tourism) Transport associations	1	0	1	Members	39	0	39	23.4	24	0	0	24
9	University (of Gondar) tourism departments	1	0	1	Lecturers	10	0	10	6	6	0	0	6
10	University (of Gondar) hotel departments	1	0	1	Lecturers	8	0	8	4.8	5	0	0	5
11	Vocational training center hotel and tourism departments	1	1	2	Lecturers	8	2	10	4.8	5	1.2	2	7
12	NGO		4	4	Head		4	4	0	0	2.4	3	3
13	Ethiopian Orthodox Church	2	0	2	Church head	2		2	1.2	2	0	0	2
14	Ethiopian Airlines	1	0	1	General manager	1	0	1	0.6	1	0	0	1
Total		56	18	74		186	86	272	111.6	116	51.6	54	170

Key:

- (G)*..... Gondar
- (D)**.....Debark

APPENDIX B

Results on the respondents' view of the importance of factors of destination competitiveness N=170

No	Factors/ Attributes	Importance													
		Very unimportant		Unimportant		Neutral		Important		Very important		mean	median	mode	Standard deviation
		freq	%	freq	%	freq	%	freq	%	freq	%				
A. Destination Attractions															
1	Comfortable climate for tourism							11	6.5	159	93.5	4.94	5.00	5.00	.25
2	Natural landscape					2	1.2	5	2.9	163	95.9	4.95	5.00	5.00	.27
3	Wonderful scenery					1	.6	8	4.7	161	94.7	4.94	5.00	5.00	.26
4	Cultural and historical attractions					2	1.2	19	11.2	149	87.6	4.86	5.00	5.00	.38
5	Artistic and architectural design					1	.6	49	28.8	120	70.6	4.70	5.00	5.00	.47
6	Traditional art and crafts					3	1.8	45	26.5	122	71.8	4.70	5.00	5.00	.50
7	Exotic and unique local custom			1	.6	4	2.4	33	19.4	132	77.6	4.74	5.00	5.00	.53
B. Tourism Superstructure															
8	Variety of accommodation			1	.6	1	.6	10	5.9	158	92.9	4.91	5.00	5.00	.36
9	Quality service in accommodation			1	.6			5	2.9	164	96.5	4.95	5.00	5.00	.28
10	Variety of food and beverage services			1	.6	1	.6	10	5.9	158	92.9	4.91	5.00	5.00	.36
11	Quality services in food and beverage services			1	.6			6	3.5	163	95.9	4.95	5.00	5.00	.29
12	Variety of evening entertainment	1	.6	1	.6	3	1.8	101	59.4	64	37.6	4.33	4.00	4.00	.60
13	Tourism activities					1	.6	57	33.5	112	65.9	4.65	5.00	5.00	.49
14	Variety of shopping items			1	.6			30	17.6	139	81.8	4.81	5.00	5.00	.44
15	Presence of service providers					1	.6	11	6.5	158	92.9	4.92	5.00	5.00	.29
C. General Infrastructure															
16	Various modes of transport					2	1.2	14	8.2	154	90.6	4.89	5.00	5.00	.34
17	Smooth transportation within destination					3	1.8	15	8.8	152	89.4	4.88	5.00	5.00	.38
Continues to the next page.....															

No	Factors/ Attributes	Very unimportant		Unimportant		Neutral		Important		Very important		mean	median	mode	Standard deviation
		freq	%	freq	%	freq	%	freq	%	freq	%				
18	Banking and financial services					1	.6	9	5.3	160	94.1	4.94	5.00	5.00	.27
19	Telecommunication services					2	1.2	14	8.2	154	90.6	4.89	5.00	5.00	.34
20	Electric supply					2	1.2	7	4.1	161	94.7	4.94	5.00	5.00	.29
21	Infrastructure to meet visitors needs					1	.6	9	5.3	160	94.1	4.94	5.00	5.00	.27
D. Destination Management															
22	Cleanliness in destination			2	1.2	1	.6	9	5.3	158	92.9	4.90	5.00	5.00	.42
23	Safety and security					1	.6	4	2.4	165	97.1	4.96	5.00	5.00	.21
24	Public bathrooms and restrooms			1	.6			12	7.1	157	92.4	4.91	5.00	5.00	.34
25	Multilingual signage					3	1.8	32	18.8	135	79.4	4.78	5.00	5.00	.46
26	Easy access to get destination map/leaflets			1	.6	1	.6	16	9.4	152	89.4	4.88	5.00	5.00	.40
27	Favorable policies to tourists					2	1.2	13	7.6	155	91.2	4.90	5.00	5.00	.34
28	Cultural heritage preservation					1	.6	6	3.5	163	95.9	4.95	5.00	5.00	.24
29	Conservation of local tradition					1	.6	8	4.7	161	94.7	4.94	5.00	5.00	.26
30	Environmental conservation			1	.6	1	.6	7	4.1	161	94.7	4.93	5.00	5.00	.34
31	Efficiencies of tourism and hospitality staff			1	.6			8	4.7	161	94.7	4.94	5.00	5.00	.31
32	Use of IT in destination			1	.6			15	8.8	154	90.6	4.89	5.00	5.00	.36
E. Destination Image															
33	Overall price in destination					4	2.4	21	12.4	145	85.3	4.83	5.00	5.00	.44
34	Ensured safety and security							7	4.1	163	95.9	4.96	5.00	5.00	.20
35	Crowd of tourists			4	2.4	12	7.1	24	14.1	130	76.5	4.65	5.00	5.00	.72
36	Friendliness of local people					2	1.2	8	4.7	160	94.1	4.93	5.00	5.00	.30

Note that all the areas shaded in gray show all the response alternatives not chosen by respondents.

APPENDIX C

Results on the respondents' view of the performance of NG as an international tourism destination

N=170

No	Factors/ Attributes	Performance										mean	median	mode	Standard deviation
		Very low		Low		Normal		High		Very high					
		freq	%	freq	%	freq	%	freq	%	freq	%				
A. Destination Attractions															
1	Comfortable climate for tourism			3	1.8	14	8.2	45	26.5	108	63.5	4.52	5.00	5.00	.72
2	Natural landscape					3	1.8	15	8.8	152	89.4	4.88	5.00	5.00	.38
3	Wonderful scenery					8	4.7	9	5.3	153	90.0	4.85	5.00	5.00	.47
4	Cultural and historical attractions			3	1.8	6	3.5	41	24.1	120	70.6	4.64	5.00	5.00	.64
5	Artistic and architectural design	1	.6	5	2.9	15	8.8	46	27.1	103	60.6	4.44	5.00	5.00	.82
6	Traditional art and crafts	1	.6	11	6.5	39	22.9	71	41.8	48	28.2	3.91	4.00	4.00	.91
7	Exotic and unique local custom	1	.6	6	3.5	12	7.1	55	32.4	96	56.5	4.41	5.00	5.00	.82
B. Tourism Superstructure															
8	Variety of accommodation	14	8.2	134	78.8	15	8.8	5	2.9	2	1.2	2.10	2.00	2.00	.62
9	Quality service in accommodation	18	10.6	135	79.4	13	7.6	3	1.8	1	.6	2.02	2.00	2.00	.55
10	Variety of food and beverage services	26	15.3	121	71.2	17	10.0	6	3.5			2.02	2.00	2.00	.63
11	Quality services in food and beverage services	27	15.9	125	73.5	15	8.8	2	1.2	1	.6	1.97	2.00	2.00	.59
12	Variety of evening entertainment	23	13.5	112	65.9	26	15.3	6	3.5	3	1.8	2.14	2.00	2.00	.76
13	Tourism activities	16	9.4	130	76.5	16	9.4	5	2.9	3	1.8	2.11	2.00	2.00	.67
14	Variety of shopping items	19	11.2	128	75.3	16	9.4	3	1.8	4	2.4	2.09	2.00	2.00	.70
15	Presence of service providers	14	8.2	120	70.6	29	17.1	4	2.4	3	1.8	2.19	2.00	2.00	.69
C. General Infrastructure															
16	Various modes of transport	25	14.7	115	67.6	22	12.9	5	2.9	3	1.8	2.09	2.00	2.00	.74
17	Smooth transportation within destination	24	14.1	109	64.1	31	18.2	3	1.8	3	1.8	2.13	2.00	2.00	.73
Continues to the next page.....															

No	Factors/ Attributes	Very low		Low		Normal		High		Very high		mean	median	mode	Standard deviation
		freq	%	freq	%	freq	%	freq	%	freq	%				
18	Banking and financial services	7	4.1	27	15.9	115	67.6	13	7.6	8	4.7	2.93	3.00	3.00	.77
19	Telecommunication services	12	7.1	78	45.9	75	44.1	2	1.2	3	1.8	2.45	2.00	2.00	.72
20	Electric supply	21	12.4	128	75.3	18	10.6	1	.6	2	1.2	2.03	2.00	2.00	.60
21	Infrastructure to meet visitors needs	35	20.6	120	70.6	10	5.9	3	1.8	2	1.2	1.92	2.00	2.00	.66
D. Destination Management															
22	Cleanliness in destination	37	21.8	113	66.5	16	9.4	2	1.2	2	1.2	1.94	2.00	2.00	.68
23	Safety and security	5	2.9	16	9.4	84	49.4	54	31.8	11	6.5	3.29	3.00	3.00	.84
24	Public bathrooms and restrooms	54	31.8	103	60.6	9	5.3	4	2.4			1.78	2.00	2.00	.65
25	Multilingual signage	51	30.0	110	64.7	9	5.3					1.75	2.00	2.00	.54
26	Easy access to get destination map/leaflets	21	12.4	133	78.2	15	8.8			1	.6	1.98	2.00	2.00	.52
27	Favorable policies to tourists	20	11.8	92	54.1	49	28.8	6	3.5	3	1.8	2.29	2.00	2.00	.79
28	Cultural heritage preservation	19	11.2	125	73.5	20	11.8	5	2.9	1	.6	2.08	2.00	2.00	.63
29	Conservation of local tradition	36	21.2	105	61.8	24	14.1	4	2.4	1	.6	1.99	2.00	2.00	.71
30	Environmental conservation	20	11.8	125	73.5	23	13.5	1	.6	1	.6	2.05	2.00	2.00	.57
31	Efficiencies of tourism and hospitality staff	11	6.5	137	80.6	21	12.4	1	.6			2.07	2.00	2.00	.46
32	Use of IT in destination	32	18.8	126	74.1	11	6.5	1	.6			1.89	2.00	2.00	.52
E. Destination Image															
33	Overall price in destination	4	2.4	87	51.2	37	21.8	36	21.2	6	3.5	2.72	2.00	2.00	.94
34	Ensured safety and security	10	5.9	108	63.5	41	24.1	7	4.1	4	2.4	2.34	2.00	2.00	.75
35	Crowd of tourists	4	2.4	3	1.8	11	6.5	116	68.2	36	21.2	4.04	4.00	4.00	.75
36	Friendliness of local people	1	.6	3	1.8	10	5.9	77	45.3	79	46.5	4.35	4.00	5.00	.72

Note that all the areas shaded in gray show all the response alternatives not chosen by respondents.

APPENDIX D

Importance and Performance Mean Scores of Attributes

No.	Attributes	Mean scores*	
		Performance	Importance
Destination Attractions			
1	Comfortable climate for tourism	4.52	4.94
2	Natural landscape	4.88	4.95
3	Wonderful scenery	4.85	4.94
4	Cultural and historical attractions	4.64	4.86
5	Artistic and architectural design	4.44	4.7
6	Traditional art and crafts	3.91	4.7
7	Exotic and unique local custom	4.41	4.74
Tourism Superstructure			
8	Variety of accommodation	2.1	4.91
9	Quality service in accommodation	2.02	4.95
10	Variety of food and beverage services	2.02	4.91
11	Quality services in food and beverage services	1.97	4.95
12	Variety of evening entertainment	2.14	4.33
13	Tourism activities	2.11	4.65
14	Variety of shopping items	2.09	4.81
15	Presence of service providers	2.19	4.92
General Infrastructure			
16	Various modes of transport	2.09	4.89
17	Smooth transportation within destination	2.13	4.88
18	Banking and financial services	2.93	4.94
19	Telecommunication services	2.45	4.89
20	Electric supply	2.03	4.94
21	Infrastructure to meet visitors needs	1.92	4.94
Destination Management			
22	Cleanliness in destination	1.94	4.9
23	Safety and security	3.29	4.96
24	Public bathrooms and restrooms	1.78	4.91
25	Multilingual signage	1.75	4.78
26	Easy access to get destination map/leaflets	1.98	4.88
27	Favorable policies to tourists	2.29	4.9
28	Cultural heritage preservation	2.08	4.95
29	Conservation of local tradition	1.99	4.94
30	Environmental conservation	2.05	4.93

No	Attributes	Mean scores*	
		Performance	Importance
31	Efficiencies of tourism and hospitality staff	2.07	4.94
32	Use of IT in destination	1.89	4.89
Destination Image			
33	Overall price in destination	2.72	4.83
34	Ensured safety and security	2.34	4.96
35	Crowd of tourists	4.04	4.65
36	Friendliness of local people	4.35	4.93
Grand Mean		2.73	4.86

Note:

*Scores from a five-point scale:

Importance - “1 = very unimportant, 2 = unimportant, 3 = neutral, 4 = important, 5 = very important”

Performance - “1 = very low, 2 = low, 3 = normal, 4 = high, 5 = very high”

APPENDIX E

Pre-test results on the respondents' view of the importance of factors of destination competitiveness

N=30

No	Factors/ Attributes	Importance										mean	median	mode	Standard deviation
		Very unimportant		Unimportant		Neutral		Important		Very important					
		freq	%	freq	%	freq	%	freq	%	freq	%				
A. Destination Attractions															
1	Comfortable climate for tourism							3	10.0%	27	90.0%	4.90	5	5	0.31
2	Natural landscape							1	3.3%	29	96.7%	4.97	5	5	0.18
3	Wonderful scenery							2	6.7%	28	93.3%	4.93	5	5	0.25
4	Cultural and historical attractions							4	13.3%	26	86.7%	4.87	5	5	0.35
5	Artistic and architectural design							7	23.3%	23	76.7%	4.77	5	5	0.43
6	Traditional art and crafts							9	30.0%	21	70.0%	4.70	5	5	0.47
7	Exotic and unique local custom							6	20.0%	24	80.0%	4.80	5	5	0.41
B. Tourism Superstructure															
8	Variety of accommodation							2	6.7%	28	93.3%	4.93	5	5	0.25
9	Quality service in accommodation							1	3.3%	29	96.7%	4.97	5	5	0.18
10	Variety of food and beverage services							3	10.0%	27	90.0%	4.90	5	5	0.31
11	Quality services in food and beverage services							1	3.3%	29	96.7%	4.97	5	5	0.18
12	Variety of evening entertainment					1	3.3%	17	56.7%	12	40.0%	4.37	4	4	0.56
13	Tourism activities							11	36.7%	19	63.3%	4.63	5	5	0.49
14	Variety of shopping items							5	16.7%	25	83.3%	4.83	5	5	0.38
15	Presence of service providers							3	10.0%	27	90.0%	4.90	5	5	0.31
C. General Infrastructure															
16	Various modes of transport							3	10.0%	27	90.0%	4.90	5	5	0.31
17	Smooth transportation within destination							4	13.3%	26	86.7%	4.87	5	5	0.35

No	Factors/ Attributes	Very unimportant		Unimportant		Neutral		Important		Very important		mean	median	mode	Standard deviation
		freq	%	freq	%	freq	%	freq	%	freq	%				
18	Banking and financial services							3	10.0%	27	90.0%	4.90	5	5	0.31
19	Telecommunication services							5	16.7%	25	83.3%	4.83	5	5	0.38
20	Electric supply							2	6.7%	28	93.3%	4.93	5	5	0.25
21	Infrastructure to meet visitors needs							3	10.0%	27	90.0%	4.90	5	5	0.31
D. Destination Management															
22	Cleanliness in destination							2	6.7%	28	93.3%	4.93	5	5	0.25
23	Safety and security							1	3.3%	29	96.7%	4.97	5	5	0.18
24	Public bathrooms and restrooms							2	6.7%	28	93.3%	4.93	5	5	0.25
25	Multilingual signage							8	26.7%	22	73.3%	4.73	5	5	0.45
26	Easy access to get destination map/leaflets							3	10.0%	27	90.0%	4.90	5	5	0.31
27	Favorable policies to tourists							5	16.7%	25	83.3%	4.83	5	5	0.38
28	Cultural heritage preservation							1	3.3%	29	96.7%	4.97	5	5	0.18
29	Conservation of local tradition							2	6.7%	28	93.3%	4.93	5	5	0.25
30	Environmental conservation							2	6.7%	28	93.3%	4.93	5	5	0.25
31	Efficiencies of tourism and hospitality staff							1	3.3%	29	96.7%	4.97	5	5	0.18
32	Use of IT in destination							3	10.0%	27	90.0%	4.90	5	5	0.31
E. Destination Image															
33	Overall price in destination					2	6.7%	5	16.7%	23	76.7%	4.70	5	5	0.60
34	Ensured safety and security							1	3.3%	29	96.7%	4.97	5	5	0.18
35	Crowd of tourists			1	3.3%	2	6.7%	5	16.7%	22	73.3%	4.60	5	5	0.77
36	Friendliness of local people							3	10.0%	27	90.0%	4.90	5	5	0.31

Note that all the areas shaded in gray show all the response alternatives not chosen by respondents.

APPENDIX F

Pre-test results on the respondents' view of the performance of NG zone as a tourism destination

N=30

No	Factors/ Attributes	Performance										mean	median	mode	Standard deviation
		Very low		Low		Normal		High		Very high					
		freq	%	freq	%	freq	%	freq	%	freq	%				
A. Destination Attractions															
1	Comfortable climate for tourism					3	10.0%	10	33.3%	17	56.7%	4.47	5.00	5.00	.68
2	Natural landscape					1	3.3%	3	10.0%	26	86.7%	4.83	5.00	5.00	.46
3	Wonderful scenery					2	6.7%			28	93.3%	4.87	5.00	5.00	.51
4	Cultural and historical attractions					2	6.7%	10	33.3%	18	60.0%	4.53	5.00	5.00	.63
5	Artistic and architectural design					4	13.3%	8	26.7%	18	60.0%	4.47	5.00	5.00	.73
6	Traditional art and crafts			3	10.0%	6	20.0%	12	40.0%	9	30.0%	3.90	4.00	4.00	.96
7	Exotic and unique local custom			1	3.3%	3	10.0%	10	33.3%	16	53.3%	4.37	5.00	5.00	.81
B. Tourism Superstructure															
8	Variety of accommodation	1	3.3%	25	83.3%	4	13.3%					2.10	2.00	2.00	.40
9	Quality service in accommodation	3	10.0%	24	80.0%	3	10.0%					2.00	2.00	2.00	.45
10	Variety of food and beverage services	2	6.7%	23	76.7%	5	16.7%					2.10	2.00	2.00	.48
11	Quality services in food and beverage services	3	10.0%	23	76.7%	4	13.3%					2.03	2.00	2.00	.49
12	Variety of evening entertainment	3	10.0%	21	70.0%	5	16.7%			1	3.3%	2.17	2.00	2.00	.75
13	Tourism activities	3	10.0%	23	76.7%	3	10.0%			1	3.3%	2.10	2.00	2.00	.71
14	Variety of shopping items	5	16.7%	23	76.7%	1	3.3%			1	3.3%	1.97	2.00	2.00	.72
15	Presence of service providers	1	3.3%	24	80.0%	4	13.3%			1	3.3%	2.20	2.00	2.00	.66
C. General Infrastructure															
16	Various modes of transport	4	13.3%	19	63.3%	6	20.0%			1	3.3%	2.17	2.00	2.00	.79
17	Smooth transportation within destination	3	10.0%	22	73.3%	4	13.3%			1	3.3%	2.13	2.00	2.00	.73

No	Factor/Attribute	Very low		Low		Normal		High		Very high		mean	median	mode	Standard deviation
		freq	%	freq	%	freq	%	freq	%	freq	%				
18	Banking and financial services			2	6.7%	23	76.7%	4	13.3%	1	3.3%	3.13	3.00	3.00	.57
19	Telecommunication services	1	3.3%	10	33.3%	18	60.0%			1	3.3%	2.67	3.00	3.00	.71
20	Electric supply	3	10.0%	23	76.7%	4	13.3%					2.03	2.00	2.00	.49
21	Infrastructure to meet visitors needs	5	16.7%	22	73.3%	2	6.7%			1	3.3%	2.00	2.00	2.00	.74
D. Destination Management															
22	Cleanliness in destination	4	13.3%	21	70.0%	4	13.3%	1	3.3%			2.07	2.00	2.00	.64
23	Safety and security			2	6.7%	16	53.3%	11	36.7%	1	3.3%	3.37	3.00	3.00	.67
24	Public bathrooms and restrooms	7	23.3%	20	66.7%	3	10.0%					1.87	2.00	2.00	.57
25	Multilingual signage	7	23.3%	20	66.7%	3	10.0%					1.87	2.00	2.00	.57
26	Easy access to get destination map/leaflets	2	6.7%	24	80.0%	4	13.3%					2.07	2.00	2.00	.45
27	Favorable policies to tourists	2	6.7%	14	46.7%	11	36.7%	3	10.0%			2.50	2.00	2.00	.78
28	Cultural heritage preservation	2	6.7%	23	76.7%	5	16.7%					2.10	2.00	2.00	.48
29	Conservation of local tradition	8	26.7%	18	60.0%	4	13.3%					1.87	2.00	2.00	.63
30	Environmental conservation	2	6.7%	25	83.3%	3	10.0%					2.03	2.00	2.00	.41
31	Efficiencies of tourism and hospitality staff	2	6.7%	21	70.0%	7	23.3%					2.17	2.00	2.00	.53
32	Use of IT in destination	3	10.0%	23	76.7%	4	13.3%					2.03	2.00	2.00	.49
E. Destination Image															
33	Overall price in destination	1	3.3%	15	50.0%	8	26.7%	6	20.0%			2.63	2.00	2.00	.85
34	Ensured safety and security			19	63.3%	10	33.3%	1	3.3%			2.40	2.00	2.00	.56
35	Crowd of tourists			1	3.3%	1	3.3%	22	73.3%	6	20.0%	4.10	4.00	4.00	.61
36	Friendliness of local people					2	6.7%	14	46.7%	14	46.7%	4.40	4.00	4.00	.62

Note that all the areas shaded in gray show all the response alternatives not chosen by respondents.

APPENDIX G

THE SURVEY

Dear respondents

I am an MA student in Marketing Management at University of Gondar. I am conducting a research project (for academic reasons) that examines North Gondar tourism stakeholders' (suppliers') views about the competitiveness of the zone as an international tourism destination with specific objectives of:

- Identifying the important factors which influence the competitiveness of North Gondar as a tourist destination, and
- Measuring the performance of North Gondar's competitiveness as a tourist destination from the suppliers' perspective

As a stakeholder (supplier) in North Gondar's tourism industry, you will have valuable insights which can assist in achieving the objectives of this study. I really need your help in participating in this study and would greatly appreciate it if you could spend some time answering questions about competitiveness of North Gondar as a tourism destination!

The questionnaire should take about 10-15 minutes to complete. Thank you so much in advance for your time and help! Your response will be kept completely confidential and is of the utmost importance to me in completing this research. If you have any questions, please feel free to contact me (Kibru Aschalew) via phone at (+251918031003 and/or email kibru_2006@yahoo.com).

Again, your participation in this important project is greatly appreciated!

Sincerely,

Researcher: Kibru Aschalew

TOURISM STAKEHOLDER (SUPPLIER) SURVEY

**SURVEY ON THE COMPETITIVENESS OF NORTH GONDAR AS AN
INTERNATIONAL TOURISM DESTINATION**

SECTION A: GENERAL INFORMATION

1. Gender 1 ☐ Male 2 ☐ Female
2. Age 1 ☐ 18-24 2 ☐ 25-34 3 ☐ 35-44 4 ☐ 45-54 5 ☐ 55-64 6 ☐ age 65 or older
3. Education 1 ☐ Less than high school 2 ☐ High school 3 ☐ Certificate
4 ☐ Diploma 5 ☐ Bachelor's degree 6 ☐ Above degree
4. Marital status 1 ☐ Single 2 ☐ Married 3 ☐ Widowed 4 ☐ Divorced
5 ☐ Separated
5. Type of your organization
 1. ☐ Accommodation facility (e.g. hotel, lodge, pension)
 2. ☐ Airline
 3. ☐ Distribution channel (e.g. Tour operator/Travel agent)
 4. ☐ Educational center (e.g. University, Vocational training center)
 5. ☐ Government tourism office
 6. ☐ Ground transport (e.g. car rental)
 7. ☐ NGO
 8. ☐ Religious center (e.g. church)
 9. ☐ Restaurant
 10. ☐ Tour guides association
 11. ☐ Tourism police association
6. For how long have you been working in the tourism industry? 1 ☐ 1-5 years
2 ☐ 6-10 years 3 ☐ Longer than 10 years
7. Where is your organization located? 1 ☐ Gondar 2 ☐ Debark
8. For how long has your organization been in operation? 1 ☐ 1-5 years 2 ☐ 6-10 years 3 ☐ Longer than 10 years

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9. How important is North Gondar (as a tourism destination) for the existence of your organization?
(please tick)

	1 Very important	2 Of increasing importance	3 Of diminishing importance	4 Not important
Currently				
In the future				

SECTION B: IMPORTANCE OF ATTRIBUTES AND PERFORMANCE OF DESTINATION

B.1. IMPORTANCE

In the next pages will find a list of items which influence (positively or negatively) the competitiveness of a tourism destination.

In your opinion, how important is each of these items for North Gondar to be competitive in the international tourism market?

1 = very unimportant 2 = unimportant 3 = neutral 4 = important 5 =very important

B.2. DESTINATION PERFORMANCE

This section is based on your individual view and knowledge about North Gondar as an international tourism destination. Please give grade to the performance of the zone (North Gondar) as an international tourism destination on the space provided.

Examples:

If you think that North Gondar's climate is comfortable, that means the zone is competitive for tourism, then give a higher grade.

If you think that North Gondar is less competitive for tourism in Electricity supply, then give lower grade.

Give grades from 1(lowest) to 5 (highest) for the performance of North Gondar zone as an international tourism destination, in each item.

1 = very low 2 = low 3 = normal 4 = high 5 =very high

Attributes (factors)	Importance					Performance				
	1	2	3	4	5	1	2	3	4	5
	Very unimportant	Unimportant	Neutral	Important	Very important	Very low	Low	Normal	High	Very high
A. Destination Attractions										
1. Comfortable climate for tourism	1	2	3	4	5	1	2	3	4	5
2. Natural landscape	1	2	3	4	5	1	2	3	4	5
3. Wonderful scenery	1	2	3	4	5	1	2	3	4	5
4. Cultural and historical attractions	1	2	3	4	5	1	2	3	4	5
5. Artistic and architectural design	1	2	3	4	5	1	2	3	4	5
6. Traditional art and crafts	1	2	3	4	5	1	2	3	4	5
7. Exotic and unique local custom	1	2	3	4	5	1	2	3	4	5
B. Tourism Superstructure										
8. Variety of accommodation	1	2	3	4	5	1	2	3	4	5
9. Quality service in accommodation	1	2	3	4	5	1	2	3	4	5
10. Variety of food and beverage services	1	2	3	4	5	1	2	3	4	5
11. Quality services in food and beverage services	1	2	3	4	5	1	2	3	4	5
12. Variety of evening entertainment	1	2	3	4	5	1	2	3	4	5
13. Tourism activities	1	2	3	4	5	1	2	3	4	5
14. Variety of shopping items	1	2	3	4	5	1	2	3	4	5
15. Presence of service providers	1	2	3	4	5	1	2	3	4	5
C. General Infrastructure										
16. Various modes of transport	1	2	3	4	5	1	2	3	4	5
17. Smooth transportation within destination	1	2	3	4	5	1	2	3	4	5
18. Banking and financial services	1	2	3	4	5	1	2	3	4	5
19. Telecommunication services	1	2	3	4	5	1	2	3	4	5
20. Electric supply	1	2	3	4	5	1	2	3	4	5
21. Infrastructure to meet visitors' needs	1	2	3	4	5	1	2	3	4	5
D. Destination Management										
22. Cleanliness in destination	1	2	3	4	5	1	2	3	4	5
23. Safety and security	1	2	3	4	5	1	2	3	4	5
24. Public bathrooms and rest rooms	1	2	3	4	5	1	2	3	4	5

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Attributes (factors)	Importance					Performance				
	1	2	3	4	5	1	2	3	4	5
	Very unimportant	Unimportant	Neutral	Important	Very important	Very low	Low	Normal	High	Very high
25. Multilingual signage	1	2	3	4	5	1	2	3	4	5
26. Easy access to get destination map/ leaflets	1	2	3	4	5	1	2	3	4	5
27. Favorable policies to tourists	1	2	3	4	5	1	2	3	4	5
28. Cultural heritage preservation	1	2	3	4	5	1	2	3	4	5
29. Conservation of local tradition	1	2	3	4	5	1	2	3	4	5
30. Environmental conservation	1	2	3	4	5	1	2	3	4	5
31. Efficiencies of tourism and hospitality staff	1	2	3	4	5	1	2	3	4	5
32. Use of IT in destination	1	2	3	4	5	1	2	3	4	5
E. Destination Image										
33. Overall price in destination	1	2	3	4	5	1	2	3	4	5
34. Ensured safety and security	1	2	3	4	5	1	2	3	4	5
35. Crowd of tourists	1	2	3	4	5	1	2	3	4	5
36. Friendliness of local people	1	2	3	4	5	1	2	3	4	5

Please feel free to provide any further comments and/or suggestions regarding this study:

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Thank you very much for filling out the survey!